

California Student Aid Commission

**2018
Regional
Training**



California Student Aid Commission

**Navigating
WebGrants**





Disclaimer

All student data provided in the following reports are fictitious. Student names, DOB, GPAs and school information has been modified to protect all third parties. All material presented today is for training purposes only.



Getting Access

Making education beyond high school financially accessible to all Californians.



Getting Started with WebGrants

Complete and submit:

- WebGrants System Administrator's Access Request Form or User Access Request Form
- Information Security and Confidentiality Agreement





WebGrants Access Forms

Grant Delivery System (GDS) - WebGrants
College System

A signed GDS - WebGrants Commission prior to gain Password. System Ad

California Student Aid Commission
Information Security and Confidentiality Agreement

The Information Security and Confidentiality Agreement is required by the California Student Aid Commission (Commission) from any person or entity (high school, post-secondary educational institution, agent, program, or 3rd party) requesting access to a Commission information technology system.

I. Institution Section
Primary Institution

Additional Institution

II. Personal Info
Name of System Ad

Password Reset / A
Question:
☐ Your first pet
☐ Your favorite
☐ Model & year

I certify that I have pertaining to the
Signature - System Ad

E-Mail Address (maximum)

III. Access Request
Note: The Institution
Date Request Subm

New Re

I certify that I have Administrator at
Signature - Institution

E-Mail Address (maximum)

ITSD F004 2016 **ITSDF018 2015**

- 1 Authorized Official
- 2 max System Administrators
 - Immediately grant/disable user access
- User Access Request Form
 - Maintained at school for each user
- Renewed annually by July 31 or with change of staff
- Records to be retained for 3 years
- Complete the Information Security Training





Information Security Training

- Complete security training annually
- Must cover the following areas:
 - Information security
 - Privacy
 - Confidentiality
- Must retain training documentation at the institution



Your WebGrants Account

Making education beyond high school financially accessible to all Californians.



Your WebGrants Account

Please contact your School's System Administrator if you need access to additional screens.

Portal Menu

[WebGrants](#)

[Table Edit](#)

[User Administration](#)

[CA Dream Act](#)

[SB 70](#)

Account Information

[View Your Account Details](#)

[Help With Your Account](#)



Your Account Details

- Keep your personal info up-to-date (phone number, email address)
- Change your password if necessary.
- View who (at your campus) is your System Administrator(s)

[Back to Home Page](#)

Account Summary for Justin Watkins

Sign-in Info

User Name:SA3JXW

[Change your password](#)

E-mail Address:jwatkins@csac.ca.gov

Change your E-Mail Address:

Submit

Sign-out

You may wish to sign-out from your account when you leave a public computer. [Click here to sign-out.](#)

Screen Access List

Enrollment - read
Upload Enrollment - write
File Upload Status - write
Add Enrollment - write
Delete/View Enrollment - write
Enrollment Data Inquiry - Details - read
Enrollment Data Inquiry - Load Summary - read

[Help With Your Account](#)

Contact Info

Current contact info:
Justin Watkins
10834 International Drive Ste #100
Rancho Cordova CA 95670
Day Phone: 9164646425 Ext

Change your phone number:
 Ext

Submit

Fax Number:

School Access List

99999999 - CSAC HS GPA SECURITY

School Administrators

Name	School ID	Phone Number
------	-----------	--------------



If You Are The System Administrator...

You have access to create/change WebGrants User Accounts for your campus

Please contact your School's System Administrator if you need access to additional screens.

Portal Menu

[WebGrants](#)

[Table Edit](#)

[User Administration](#)

[CA Dream Act](#)

[SB 70](#)

Account Information

[View Your Account Details](#)

[Help With Your Account](#)



User Administration

User Administration Menu

[Add New Users](#)

[Edit Existing Users](#)

[User Access Report](#)



Adding a New User

- User ID must be unique
- All fields marked with (*) are required
- Access cannot exceed 1 calendar year
- User Access Forms must be kept on file

UserID/Password	
User ID *	<input type="text"/>
Password *	<input type="password"/>
<small>Six-character minimum; no spaces</small>	
Retype Password *	<input type="password"/>

Contact Information	
First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Title	<input type="text"/>
Address 1 *	<input type="text"/>
Address 2	<input type="text"/>
City *	<input type="text"/>
State *	<input type="text"/>
Zip Code *	<input type="text"/>
Email Address *	<input type="text"/>
ReType Email Address *	<input type="text"/>
Phone Number *	<input type="text"/> <input type="text"/> <input type="text"/> Ext <input type="text"/>
Fax Number	<input type="text"/>
Security Training Received Date	<input type="text"/>
<small>Date Format: mm/dd/yyyy example: 02/18/2002</small>	

User Roles	
User Role *	<input type="text"/>
Screen Templates	<input type="text"/>
Effective Start Date *	03/18/2014
Effective End Date *	<input type="text"/>
<small>Date Format: mm/dd/yyyy example: 02/18/2002</small>	

Add New User



Adding a New User

- Assign access to specific WebGrants screens depending on what the User will be doing
- For Example: a User from your fiscal office may only need access to 'Report Download', and the Reconciliation screens.

Screen Access				
Screen Name	Access Permissions			
Enrollment				
GPA				
Student Info				
<i>Award Summary</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>Award Detail</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>Student History</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>CA Aid Report</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>Grant Record Changes</i>	<input type="radio"/> None	<input type="radio"/> Read	<input checked="" type="radio"/> Write	<input type="radio"/> Grant
<i>Simulator</i>	<input type="radio"/> None	<input type="radio"/> Read	<input checked="" type="radio"/> Write	<input type="radio"/> Grant
School Info				
Roster/Reconciliation				
<i>Customize Roster</i>	<input type="radio"/> None	<input type="radio"/> Read	<input checked="" type="radio"/> Write	<input type="radio"/> Grant
<i>Display Roster</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>Print Roster</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>Display Accept / Reject Report</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
Data Transfer				
Chafee Grant				
Accounting				
California National Guard				
<i>EAAP Roster</i>	<input type="radio"/> None	<input type="radio"/> Read	<input checked="" type="radio"/> Write	<input type="radio"/> Grant
<i>EAAP Payment</i>	<input type="radio"/> None	<input type="radio"/> Read	<input checked="" type="radio"/> Write	<input type="radio"/> Grant
CA Dream Act				
NON-SSN GPA				
SB 70				

Save Changes to CSAC



Disabling User Access

- Disable WebGrants access for staff that depart
- Input the date on the "End Date"





WebGrants User Access Report

- View all active or inactive accounts for your campus
- See when each User account will expire (End Date)

**California Student Aid Commission
WebGrants User Access for
CSAC**

Active Users Report

**Number of Records: 69
Print Date: 6/1/2018 12:16:34 PM**

Rec #	Name	User ID	Start Date	End Date	User Role
1	Dianne Alexander	SA9.	6/16/2016	6/16/2018	
2	Javier Arguello	SA9.	1/9/2017	1/9/2020	
3	Aidee Bucio	SA9.	9/30/2016	9/30/2018	
4	Nai Saeteurn	SA9	8/15/2014	8/15/2020	
5	Adrian Slade	SA9	12/8/2015	12/7/2018	



Best Practice

- Renew your access each year
 - Set reminders to review user end dates
 - Information Security Confidentiality Agreement
 - System Administrator Access Request Form
- Contact Technology Help Desk for access assistance
 - 888-294-0148
 - csachelpdesk@csac.ca.gov
- Contact Institution Support for assistance
 - 888-294-0153
 - schoolsupport@csac.ca.gov



Student Info Screens

Making education beyond high school financially accessible to all Californians.



Award Summary

- Displays history of a Cal Grant application for individual students
- Hover mouse over many of the fields to see more detail

Student Award Summary

- All data columns can be sorted either ascending or descending order.
- Click on the blue column headings to change the sort order of the data.
- Additional information can be viewed by moving your mouse over certain data fields.

Search = SSN

Home Phone:
Cell Phone:
E-Mail:

SSN:
CSAC ID:
Grant ID:
Date of Birth:
WGS Account: Active
Third Party Access: NONE
Selective Service Status:
School Confirmed: No

Academic Year ▼	Program Name	Application Status	Award Status	Award Status Date	Award Amount	Cycle ID	School ID	P/E Reason	C/E Reason	CC Reserve
2016-2017	B	COMM WTH	COMM WTH	04/19/2017	\$13,964	E2	00131300	30		N
2015-2016	A	F-E CMPL	COMM WTH	11/25/2015	\$12,240	E2	00131300	88		N
2015-2016	B	F-E CMPL	AUTO ACC	07/27/2015	\$13,896	E2	00131300			N
2014-2015	A	F-E CMPL	DENY LOW	10/06/2014	\$12,192	C2	00123200			Y
2014-2015	B	F-E CMPL	DENY LOW	10/06/2014	\$1,648	C2	00123200			Y
2013-2014	A	F-E CMPL	DENY LOW	09/30/2013	\$12,192	C2	00123200			Y
2013-2014	B	F-E CMPL	DENY LOW	09/30/2013	\$1,473	C2	00123200			Y



Student Award Detail

- Information listed on the FAFSA or Dream Act
- View details of award or disqualification by Academic Year
- Shows Cal A & B Scores

Student Award Detail			
<p>Both new and renewal students can be viewed.</p> <p>Only award types with data will be displayed.</p>			
<p>Search = <input type="text" value="SSN"/> <input type="text"/> Acad Year = <input type="text" value="2017-2018"/> <input type="button" value="GO"/></p>			
<p>GRIFFIN</p> <p>Application Status: FIN ELIGIBILITY COMPLETE Cycle ID: C1 SSN:</p> <p>Dependency Status: DEPENDENT Parents' Marital Status: MARRIED CSAC ID:</p> <p>Parents' Total Income: \$21,948 Parents' Family Size: 3 Grant ID:</p> <p>Parents' Net Worth: \$0 Family in College: 1 Education Level (EL): 1</p> <p>Registered Domestic Partner: No ISIR Ref: 02 Date: 03/01/2017 EL Verification: VERIFICATION REQUIRED</p> <p>Year Entered Program: 2017</p>			
NEW			
	Cal Grant A	Cal Grant B	Cal Grant C
School ID/Program Code	00730400 00	00730400 00	00730400 00
Segment	PR 4Y GR	PR 4Y GR	PR 4Y GR
Semester/Quarter	SEMESTER	SEMESTER	SEMESTER
Score		429	
Score Detail	CAL A SCORES	CAL B SCORES	CAL C SCORES
GPA/Type	0.00 / Reestablished GPA	2.50 / RE-ESTAB	0.00 / Reestablished GPA
Attendance Status	FULL	FULL	FULL
Housing Code	1 - CAMPUS	1 - CAMPUS	1 - CAMPUS
Remaining Program Eligibility	400.00%	400.00%	200.00%
Award Status	PROGRAM EDIT DISQUAL	SCORE BELOW CUTOFF	FINANCIALLY ELIGIBLE
Budget Amount/Duration	\$0 / 12	\$45,490 / 12	\$45,490 / 12
Expected Family Contribution (EFC)	\$965	\$965	\$965
Other Aid	\$0	\$0	\$0
Veterans Benefits	\$0	\$0	\$0
Unmet Need			\$44,525
Total Award Amount	\$0	\$2,505	\$4,513
Tuition/Fees	\$0	\$0	\$3,693
Access/Books&Supplies	\$0	\$2,505	\$820



Student History

- Each term payment ever reported
- Dollar amounts
- Amount of eligibility used for each payment
- Remaining eligibility

Student History			
<ul style="list-style-type: none"> Academic year selection will display all payments prior to and including the year selected. Data can be sorted by Academic Year, Term or Date. Click on the blue column headings to change the sort order of the data. 			
Search = <input type="text" value="SSN"/> <input type="button" value="Acad Year = 2016-2017"/> <input type="button" value="Txn Type = Pending"/> <input type="button" value="GO"/>			
KELSIE SSN: _____ Cycle ID: E2 TANF Eligible: Y CSAC ID: _____ Program Code: B Remaining Eligibility: .02 Grant ID: _____ TCP/5yr: _____ Award Status: 70 Remaining LOA Balance: 200 Remaining LH Balance: 100			

PG	AW	School Id	Acad Yr	Term	Leap/ Sleap	TANF Paid	Pay Amt	Pay Stat	Elig Used	Adj Amt	Adj Rsn	Date	Rec Type	Created By
B	T/F	00131300	2016	FL		Y	4,098	RP	33.33			09/23/2016	PAY	
B	ACCS	00131300	2016	FL				RA	33.33	556	FT	09/23/2016	PAY	
B	T/F	00131300	2016	WN		Y	4,098	RP	33.33			01/06/2017	PAY	
B	ACCS	00131300	2016	WN				RA	33.33	556	FT	01/06/2017	PAY	
B	T/F	00131300	2016	SP				RA	33.33	0	SR	04/19/2017	PAY	
B	ACCS	00131300	2016	SP				RA	33.33	0	SR	04/19/2017	PAY	
B	T/F	00131300	2015	FL		Y	4,080	RP	33.33			11/25/2015	PAY	
B	ACCS	00131300	2015	FL			552	RP	33.33			11/25/2015	PAY	
B	T/F	00131300	2015	WN		Y	4,080	RP	33.33			01/08/2016	PAY	
B	ACCS	00131300	2015	WN			552	RP	33.33			01/08/2016	PAY	
B	T/F	00131300	2015	SP		Y	4,080	RP	33.33			04/01/2016	PAY	
B	ACCS	00131300	2015	SP			552	RP	33.33			04/01/2016	PAY	



Simulator

- Allows schools to simulate a student's award amount at your campus
- Applies to awarded students

Search = Acad Year =

Current Award Information

Name:

SSN:

CSAC ID:

USED Code:

Housing Code:

Annual Award Details:

Grant Program:

Total Annual Award Amount:

Tuition Fees:

Access Amount:

Books and Supplies:

Award Status:

001313 00 UNIV OF CA - DAVIS

1 CAMPUS

Cal Grant A

Cycle ID: E1

\$12,630

\$12,630

N/A

N/A

Awarded

Simulated Award Information

00799300

CSU BAKERSFIELD

00

OR

CSU BAKERSFIELD - 00799300

01 - On Campus

Cycle ID: E1

Annual Award Details:

Grant Program:

Total Annual Award Amount:

Tuition Fees:

Access Amount:

Books and Supplies:

Award Status:

Cal Grant A

\$5,742

\$5,742

N/A

N/A

Qualified

Cal Grant B

\$1,672

\$0

\$1,672

N/A

Awarded

Cal Grant C

N/A

N/A

N/A

N/A





Grant Record Changes (G-21)

- Changes/updates to student records
- All G-21's submitted are reviewed by Commission staff before approval

Search =

Acad Year =

Pending CSAC Approval

New Student

Date of Birth:
Grant ID:

SSN:
CSAC ID:

Educational Level (EL) Verification:
The above student's initial grant payment was or is to be made at this institution.
At the time of this grant payment the student's EL was (1-Freshman) verify without change ☐

☐ **Dependency Status Override:** My institution has determined that the student should be considered independent for purposes of establishing federal and campus financial aid eligibility not otherwise qualifying as an independent student. (Appropriate financial information must be provided below).

Dependency Status:
☐ Dependent
☐ Independent with dependents other than a spouse
☐ Independent without dependents other than a spouse

Estimated Family Contribution (EFC) Formula Calculation:
☐ Automatic Zero ☐ EFC Simplified ☐ Regular

Number of Family Members: (5)
EFC: (375)
Unmet Need: (28939)

Parents:
Marital Status: (Divorced or Separated)
Total Income: (49063)
Adjusted Net Worth (assets): (0)

Student (and Spouse):
 (Single)
 (0)
 (0)

Registered Domestic Partnership:
☐ Parent ☐ Student

Reason:

PER FAFSA ISIR #04 PARENT INCOME EXCEEDS CEILING FOR CAL B- PLEASE RECONSIDER FOR CALA.



School Info Screens

Making education beyond high school financially accessible to all Californians.



School Info Menu

School Info Menu

[Demographics](#)

[Contact Information](#)

[Cost Estimate](#)

[Search](#)



Institution Demographics

School ID = 00123200 **GO!**

RIVERSIDE CITY COLLEGE

Address 1: *

Address 2: 4800 MAGNOLIA AVE.

City: RIVERSIDE

State: CA **Zip:** 92506 - 1299

Segment02 - COMMUNITY COLLEGE

Contract Date: 09/01/1978

Phone: (951) 222 - 8000

Source of Change: CSAC

Comments:

School Inactive Flag: ☐

Submit Changes

Reset

Previous Data

Previous Data	Source of Change	Change Date	Comments
RIVERSIDE COMMUNITY COLLEGE * 4800 MAGNOLIA AVE. RIVERSIDE, CA 92506-1299 (951)222-8000	CSAC	02-JUN-11	
RIVERSIDE COMMUNITY COLLEGE * 4800 MAGNOLIA AVE. RIVERSIDE, CA 92506-1299 (951)222-8700	CSAC	28-JUL-05	
RIVERSIDE COMMUNITY COLLEGE * 4800 MAGNOLIA AVE. RIVERSIDE, CA 92506-1299 (909)222-8700	CSAC	28-JUL-05	
RIVERSIDE CITY COLLEGE * 4800 MAGNOLIA AVE. RIVERSIDE, CA 92506-1299 (909)222-8700		10-NOV-03	



Contact Information

CHAFEE PROGRAM COORDINATOR

EditDelete

* *

OFFICE OF FINANCIAL AID
800 S. COLLEGE DR.
SANTA MARIA, CA 93454 – 6399

DIR, ADMISSIONS AND RECORDS
Phone: 805 – 922 – 6966
E-Mail:

Comment:
Last Changed By: **SA01**

Change Date: **09/19/2011**

History

CHAFEE PROGRAM COORDINATOR

First Name*:

Middle Initial:

Last Name*:

Title*: CHAFEE PROGRAM COORDINATOR

Address 1*: OFFICE OF FINANCIAL AID

Address 2: 800 S. COLLEGE DR.

City*: SANTA MARIA

State*: CA Zip Code*: 93454 – 6399

Comments:

Phone*: 805 – 922 – 6966

E-Mail*:

Maximum of 500 Characters allowed. Current count:

SaveCancel

Making education beyond high school financially accessible to all Californians.



Cost Estimate

		2017-2018	2016-2017
Title IV School ID#		001313	001313
Program/Course Length			
#of Months/Clock Hours/Credit Hours		Months ▼	
Required Attendance During Academic Year			
Number of Terms Per Year		3 Quarters ▼	3 Quarters
Term Start Dates			
Fall		09/21/2015	09/21/2015
Winter		01/04/2016	01/04/2016
Spring		03/24/2016	03/24/2016
Summer		06/20/2016	06/20/2016
Enter 9-Month Budgets for the Following Costs			
Tuition			
Amount		\$0	\$0
Fees			
Fee Type/Amount		\$	
Fee Type/Amount		\$	
Fee Type/Amount		\$	
Fee Type/Amount		\$	
Total Amount	Delete Fees	\$12804	\$12,804

Dream Act Screens

Making education beyond high school financially accessible to all Californians.



Dream Act ISIR Search Screen

A student's application will return unsearchable if the student does not add your institution to their CADAA

California Student Aid Commission (SAPRD) [Portal Menu](#) [CA Dream Act](#) [Tools](#) [Help](#) [Sign Out](#)
WebGrants System

[CA Dream Act](#) [Dream Act ISIR Search](#) [Dream Act Paper Signature](#) [Dream Act New Application](#)

Dream Act ISIR Search

Student Search

Search by:

- Pseudo SSN
- Partial first name with minimum 3 characters
- Partial last name with minimum 2 characters
- Date of Birth and partial first or last name or both
- Email address before the @ with minimum 3 characters
- Partial school name or city with minimum 3 characters

Academic Year:

Pseudo SSN/SSN:

Student's first name:

Student's last name:

Student's DOB: / /

Email Address:

Student's School Name/City:





Dream Act Search Results

Dream Act ISIR Search						
Record(s): 3			Search Results		Page: 1 of 2	
Pseudo SSN/SSN	Name Address	DOB Phone	Email Address User ID EFC	App Received Date Transaction Number Transaction Received Date	Submit Flag	
000052290	HERNANDEZ, LUIS 13000 STUDEBAKER BLVD NORWALK, CA. 90050	03/03/1993 (818) 562-2241	LUISHERNAN23@YAHOO.COM 2050909 0	01/12/2017 2 01/13/2017	Y	Correct Confirmation View Cal SAR report
000030537	HERNANDES, LUI 14 FERN ST. ONTARIO, CA. 92762	02/15/1991	LUIH@GMAIL.COM 2018443	1 01/20/2017		
000052741	HERNANDEZ, LUIS 211 ROSCOE RD CANOGA PARK, CA. 91304	10/04/1994	LUIS.1909@YAHOO.COM 2025256 2708	11/16/2016 1 11/16/2016	Y	Correct Confirmation View Cal SAR report
New Search						



Cal ISIR Correction Screen

Cal ISIR Correction Screen (2018-2019)

This screen is designed for schools to submit corrections to the most recent Cal ISIR data. Request will be updated real time.

- Data Corrections, Verification, and Dependency Overrides can be submitted at the same time.
- Verification Required – FAA marks the box when application is verified. Field only appears when student is selected for verification.
- Dependency Override – FAA marks the box when performing a dependency override. Overrides can be made in one direction only from dependent to independent.
- EFC Simulator – FAA can preview EFC changes prior to submitting a correction.
- Schools will be notified of processed corrections on the subsequent Cal ISIR Report.
- Students may review corrections by retrieving their CA Dream Act application.

Primary EFC : 0

Dependency Status : I

Transaction Received Date : 02/15/2018

Transaction Number : 1

User ID:

1) * Student's Last Name

(exactly as it appears on school records)

2) * Student's First Name



Confirmation View Screen

Dream Act ISIR Search[Back to Search Results](#)

2017 - 2018 Dream Application Confirmation Page

Dream ID #:	Transaction Date: 02/13/2017	Selective Service:
	Transaction Number: 1	

Section I-Action Needed	Comment Codes
No further action is needed. See Section III – Next Steps below.	000

Section II-No Resolution Needed	Comment Codes
We assumed certain information that is used to determine eligibility for state financial aid. If our assumptions are correct, do not change them. If they are incorrect, you need to make the necessary corrections.	117
You reported that you do not have children or other legal dependents, but you also reported that your number of family members is greater than 2. These answers are inconsistent. Please review these items and make the necessary corrections.	176

Section III - Next Steps	Comment Codes
If you need to make corrections to your information, you can make them online at www.caldreamact.org . You must use your User ID and password to retrieve your CA Dream Act Application. If you need additional help with your application, contact the Customer Relations Branch at the California Student Aid Commission Mon-Fri from 9:00 to 11:45 am or from 1:00 to 4:45 pm at 1-888-224-7268 or by email at studentsupport@csac.ca.gov . If your mailing address or email address changes, you need to make the update on your CA Dream Act Application.	006
Based on your application information, your Expected Family Contribution (EFC) is 0. Your school will use your EFC to determine your financial aid eligibility. A certified GPA submitted by March 2, 2017 is required for Cal Grant consideration. For more information, check here . Create a WebGrants for Students (WGS) account with your CA Dream Act ID above and a valid email to view your application status and to confirm your GPA has been received, if applicable. The California Student Aid Commission communicates with you through email, so make sure your email address on WGS and in this application is always kept current. Your school must verify your AB 540 eligibility. Go to your Financial Aid Office or Admissions Office to find out where to start. If you need to make corrections or update estimated income and/or taxes, go to www.caldreamact.org and select the "Login To Application" button. Once the corrections have been made, you must "Submit" your application. If you are a dependent student, your parent must also "Re-sign" your application using the parent PIN. If you need additional help, please contact the Customer Relations Branch of the California Student Aid Commission Monday through Friday from 10 am – 11:45 am and	149



Cal SAR Screen



California Student Aid Commission (SAPRD)
WebGrants System

[Portal Menu](#) [CA Dream Act](#) [Tools](#) [Help](#) [Sign Out](#)

[CA Dream Act](#) [Dream Act ISIR Search](#) [Dream Act Paper Signature](#) [Dream Act New Application](#)

Dream Act ISIR Search [Back to Search Results](#)

Cal Student Aid Reports for **GONZALO, N**

Transaction Number	Submitted By	Processed	
2	Student and Parent	01/02/2016	
1	Student	01/02/2016	



Cal SAR



California Student Aid Commission CA Dream Act Student Aid Report(2017-2018)

CA Dream Act Application Data

- Assumed fields, based on the data you entered, are marked with an "*" (asterisk) sign.
- The fields that are changed from last transaction are displayed in red.
- Parental data may still appear on the Cal SAR for applicant's that were initially deemed as a dependent student, but have changed to independent. However, only the student's information will be used in the determination of financial aid eligibility.

Your application has been selected for verification. Please check with your campus financial aid office to submit the required information.

Dream ID:

Transaction Number: 2

Submitted By:

Processed: 3/2/17

EFC:\$596

1. Your Last Name	
2. Your First Name	
3. Your Middle Initial	
4. Your Street or Post Office Mailing Address	
5. Your City	LOS ANGELES
6. Your State	CA
7. Your Zip Code	90001
8. Your Social Security Number (SSN) or Individual Taxpayer ID Number (ITIN)	
8a. Was your (SSN) issued after the DACA process?	
9. Your Date of Birth	
10. Your Permanent Phone Number	
11. Your Statewide Student Identification Number (SSID)	
12. Your Permanent Cell or Alternate Phone Number	
13. Your Driver's License Number	

Display Roster

Making education beyond high school financially accessible to all Californians.



Timing of Rosters

- When do we release rosters?
 - 2018-19 AY – February 2018
 - 2017-18 AY – May 2017
- When do students appear on the roster? (by cycle)
 - High School Entitlement – after students are claimed
 - Transfer Entitlement – immediately after award processing
 - Competitive – immediately after award processing
 - Cal Grant C – after students are scored
 - Renewal – immediately after award processing





Timing of Rosters

- What are the next steps?
 - Identifying Cal Grant awardees at your campus
 - Certify student eligibility
 - Collect appropriate verification documents
 - Verify any holds or flags
 - Education Level
 - AB 840





Identifying Cal Grant Awardees

Implementation of the Claiming Process:

- Utilize the Award Status Extract
 - Provides 2 reports
 - Awarded
 - Not Awarded
- Processing a School Change to 'claim' the student on your roster







Confirmation Required

School ID = 00115000 Acad Year = 2017 - 2018 Format = CSAC Standard Roster Search = SSN

GO!

Total number of records: 1 Total number of pages: 1



SAVE

Verify ELs as reported

Update all records with custom code

Submit

(Will display in Custom Code 5 field)

CSAC ID:										View History		Record: 1	
SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Renewal	EL Code	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section	
			E1	3	D	N	1	16405	64	.00%	.00%	UNCONFIRMED(6)	
<div><div>Custom Codes 1 <input type="text"/> 2 <input type="text"/> 3 <input type="text"/> 4 <input type="text"/> 5 <input type="text"/></div><div><div>School Change Required</div><div>School of Attendance Confirmation Required</div><div>Payment held, high school verification needed.</div></div></div>													
High School Grad. Date Verification			Status: Not Verified			Verify As <input type="text"/>			New Grad Date: Jan 2017				
Education Level (EL) Verification			Reported EL 1			Verified EL			Status 1 -- Verification Not Required				
Fall Term			Adj Reason Codes					Pay Status Codes			Delete Txn		
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type				
Totals						SC							
B - On Hold						SC							
B - On Hold						SC							
Spring Term			Adj Reason Codes					Pay Status Codes			Delete Txn		
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type				
Totals													
B - On Hold													
B - On Hold													

Making education beyond high school financially accessible to all Californians.



Display Roster

CSAC ID:										View History		Record: 17	
SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Renewal	EL Code	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section	
			E1	3	D	N	1	25978	4230	400.00%	100.00%	ELIGIBLE(1)	
Custom Codes		1	2	3	4	5							
High School Grad. Date Verification			Status: Not Verified			Verify As			New Grad Date: Jan 2016				
(High School Grad. Date Verification through CSAC) Request By : <input type="radio"/> Student <input type="radio"/> High School <input type="radio"/> College <input type="radio"/> CSAC													
Education Level (EL) Verification			Reported EL 1			Verified EL			Status 1 -- Verification Not Required				
Fall Term				Adj Reason Codes				Pay Status Codes				Delete Txn	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type				
	Totals	\$12,240	\$4,080										
A - On Hold	T/F	\$12,240	\$4,080						GRT				
Winter Term				Adj Reason Codes				Pay Status Codes				Delete Txn	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type				
	Totals	\$12,240	\$4,080										
A - On Hold	T/F	\$12,240	\$4,080						GRT				
Spring Term				Adj Reason Codes				Pay Status Codes				Delete Txn	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type				
	Totals	\$12,240	\$4,080										
A - On Hold	T/F	\$12,240	\$4,080						GRT				

Making education beyond high school financially accessible to all Californians.



Display Roster

- Grant ID
- Cycle ID
- Housing
- Dependency Status
- New/Renewal
- Education Level
- CSAC Budget
- EFC
- Remaining Eligibility
- Roster Section
- Flags
- Terms
- Program Code
- Award Type
- Annual Award
- Term Award





Display Roster

- Forecast Eligibility – identifies how much eligibility the student is expected to use for the academic year
- Custom Codes – allows a school to flag students for various things that aren't already identified by the Commission on the roster





Display Roster

- Scenario:
 - If a school reports an adjustment that is a lesser value than the maximum term amount, roster term amount will reflect the reported amount after it has been reconciled
 - If the student is eligible for the maximum term, school needs to increase payment so the roster can reflect the reported term amount
 - Maximum Term Amount: \$836
 - School reports FT \$835





Grant Roster Data File

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Transaction Code	Action Code Flag	Section Indicator	Grant ID Number	Grant ID Flag	Social Security Number	Social Security Flag	Last Name	First Name	Middle Initial	Date of Birth	Program Code	Program Code Flag	Dependency Status	New-Renew Indicator	El Code
2	GPPR		1		E12	000000000						A	-E1	D	R	2
3	GPPR		1		E13	000000000						A	-E1	D	R	1
4	GPPR		1		E12	000000000						A	-E1	D	R	2
5	GPPR		1		E13	000000000						B	-E2	D	R	3
6	GPPR		1		E13	000000000						A	-E1	D	R	1
7	GPPR		1		E11	000000000						B	-E1	D	R	3
8	GPPR		1		E13	000000000						A	-E1	D	R	1
9	GPPR		1		E11	000000000						A	-E1	D	R	3
10	GPPR		1		E14	000000000						A	-E1	D	N	1
P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD		
El Code		Housing	CSAC Budget	EFC		Adjusted	Remaining	Forecasted	Annual Award	Annual Tuition/Fee	Annual Access	Annual Books &	Fall Total	Fall Tuition/		
El Code	Flag	Code	Amount	Amount	Need	Need	Eligibility	AY Eligibility	Amount	Amount	Amount	Supplies Amount	Amount	Fee Amount		
2		2	\$28,929	\$0	\$20,070		133.36%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		
1		1	\$33,802	\$0	\$33,802		233.35%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		
2		1	\$33,802	\$0	\$32,342		133.36%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		
3		2	\$28,929	\$0	\$26,971		33.35%	100.00%	\$13,840	\$12,192	\$1,648	\$0	\$4,613.00	\$4,064.00		
1		1	\$33,802	\$0	\$31,600		400.00%	100.00%	\$12,192	\$12,192	\$0	\$0	\$0.00	\$0.00		
3		3	\$25,737	\$0	\$25,737		133.34%	100.00%	\$13,840	\$12,192	\$1,648	\$0	\$4,613.00	\$4,064.00		
1		1	\$33,802	\$0	\$30,641		233.35%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		
3		1	\$33,802	\$0	\$33,802		100.03%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		
1		1	\$33,802	\$0	\$33,802	*****	333.34%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		

Making education beyond high school financially accessible to all Californians.



Grant Roster Data File

- Report payments using batch upload process

CALIFORNIA STUDENT AID COMMISSION GRANT PAYMENT SYSTEM CAL GRANT ROSTER ELECTRONIC RECORD LAYOUT				
GRANT ROSTER HEADER RECORD				
For assistance on technical submission issues, please call the CSAC Technology Help Desk at (888) 294-0148. For assistance on programmatic issues, please call CSAC School Support Services at (888) 294-0153.				
FIELD DESCRIPTION	LENGTH	MODE	POSITION	DEFAULT / VALID VALUES
Transaction Code	4	A/N	1-4	GPHD
Data Media	2	N	5-6	09 = Data Transfer Facility
Filler	6	A/N	7-12	Blank
Submitter Identification	8	A/N	13-20	Required USDE code number
Submitter Source Code	1	A/N	21-21	Required S = School
Submitter Name	32	A/N	22-53	Required School name
Processing Date	8	N	54-61	Required CCYYMMDD
Academic Year	4	N	62-65	Required YYYY
Filler	415	A/N	66-480	Blank

RecordLayout_GrantRoster.doc
Last layout change 04-01-13
Last edit descriptions 02/19/2014

MISSION GRANT PAYMENT SYSTEM CAL GRANT ROSTER ELECTRONIC RECORD LAYOUT		
GRANT ROSTER INPUT DETAIL RECORD		
MODE	POSITION	DEFAULT / VALID VALUES
A/N	1-4	Required GPHD
A/N	5-5	Required A = Add U = Update
A/N	6-7	Blank
A/N	8-16	Required First character will always be a C, E or G 0 - 9 for remaining characters
N	17-25	Required 001010001 - 999999999
A/N	26-26	Blank
A/N	27-45	Blank = no last name
A/N	46-56	Blank = no first name
A/N	57-57	Blank = no value reported
A/N	58-65	Required YYYYMMDD
66-66		Required A = Cal Grant A B = Cal Grant B C = Cal Grant C
67-74		Blank
75-75		1 = On campus housing 2 = Off campus housing 3 = With par/relatives
76-85		Blank
86-90		Optional 00000 - 99999 (dollars only, no cents) Right justify, zero fill Blank = default

Reports

Making education beyond high school financially accessible to all Californians.



College Reports

California Student Aid Commission (SAPRD) WebGrants System

[Tools](#) [Help](#) [Sign Out](#)



Welcome!
To the **CSAC Portal** Menu

The last time you logged on to this system was: 01/21/2015 01:10:27 pm
Number of failed attempts since your last login: 1

Please contact your School's System Administrator if you need access to additional screens.

Portal Menu

[WebGrants](#)

[User Administration](#)

Account Information

[View Your Account Details](#)

[Help With Your Account](#)

[Privacy Policy](#) Copyright 2000-2015, California Student Aid Commission [Contact Us](#)

Revision: 9 Date: 12/14/2009 11:43:03 AM



Making education beyond high school financially accessible to all Californians.



College Reports

California Student Aid Commission (SAPRD)
WebGrants System

[Portal Menu](#) [WebGrants](#) [Tools](#) [Help](#) [Sign Out](#)



Welcome!
To the [WebGrants](#) Menu

The last time you logged on to this system was: 01/21/2015 01:10:27 pm

Number of failed attempts since your last login: 1

Please contact your School's System Administrator if you need access to additional screens.

WebGrants Menu

[GPA](#)

[Student Info](#)

[School Info](#)

[Data Transfer](#)

[NON-SSN GPA](#)

Account Information

[View Your Account Details](#)

[Help With Your Account](#)

[Privacy Policy](#) Copyright 2000-2015, California Student Aid Commission [Contact Us](#)

Revision: 9 Date: 12/14/2009 11:43:03 AM



Making education beyond high school financially accessible to all Californians.



College Reports

California Student Aid Commission (SAPRD)

[Portal Menu](#) [WebGrants](#) [Tools](#) [Help](#) [Sign Out](#)

WebGrants System

[Enrollment](#)

[GPA](#)

[Student Info](#)

[School Info](#)

[Roster/Reconciliation](#)

[Data Transfer](#)

[Chafee Grant](#)

[Accounting](#)

[NON-SSN GPA](#)

[Data Transfer](#)

[File Upload](#)

[Report Download](#)

Data Transfer Menu

[File Upload](#)

[Report Download](#)

Report Download

- ✦ To download or display a report or data file click on the Retrieve File button.
- ✦ All data columns can be sorted either ascending or descending order by clicking on the blue column headings.
- ✦ To compare two roster files, select Grant Roster for Report and Data File for Media Type.
- ✦ To delete uploaded Audit Files, select Audit File for Report and the Delete checkbox column will appear.

School ID =

Acad Year =

2017-2018 ▼

Month =

All ▼

Report =

All ▼

Media Type =

All ▼

GO! ➔



What reports are available?

- Accept/Reject
- Award Status Extract
- School Change Upload
- E2 Verification
- Education Level (EL) Verification
- Education Level (EL) Verification Accept/Reject
- Monthly Payment Activity
- Cal C Supplement Recipient
- Unclaimed Awards



Accept/Reject Report

1 SABRAR2 - 01 (EDE COPY)		CALIFORNIA STUDENT AID COMMISSION ACCEPT/REJECT REPORT										PAGE : 1		RUN DATE: 10/28/2011		RUN TIME: 22:55:36	
REJECTED SECTION																	
GRANT ID#	SSN	STUDENT LASTNAME	FIRST NAME	M I	PROCESS DATE	SRC CODE	ACT CODE	PGM CODE	NEED	ADJ NEED	PAY TYPE	TRM	AMOUNT	ADJ RSN	PAY STATUS		
6785:		GONZALEZ	ELIDA		10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD		
6785: PAY TYPE ACC: SCHOOL HAS ALREADY REPORTED PAYMENT																	
6785:			ROBERT		10/28/2011	C	U	C	0	0	B&S	FL	288.00		PD		
6785: PAY TYPE B&S: SCHOOL HAS ALREADY REPORTED PAYMENT																	
6785:		OROS	JOSE	A	10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD		
6785: PAY TYPE ACC: SCHOOL HAS ALREADY REPORTED PAYMENT																	

TOTALS																	
BATCH -		PAYMENTS REJECTED:		0		AMOUNT REJECTED:		0.00									
ONLINE -		PAYMENTS REJECTED:				AMOUNT REJECTED:											
COMBINED -		PAYMENTS COMBINED:				AMOUNT COMBINED:											

1SABRAR2 - 01 (EDE COPY)		CALIFORNIA STUDENT AID COMMISSION ACCEPT/REJECT REPORT										PAGE : 2		RUN DATE: 10/28/2011		RUN TIME: 22:55:36	
ACCEPTED SECTION																	
GRANT ID#	SSN	STUDENT LASTNAME	FIRST NAME	M I	PROCESS DATE	SRC CODE	ACT CODE	PGM CODE	NEED	ADJ NEED	PAY TYPE	TRM	AMOUNT	ADJ RSN	PAY STATUS		
		ACEVEDO	AMALIA		10/28/2011	C	U	B	18498	0	B&S	FL	216.00		TT		
		ACEVEDO	WILBULLO		10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD		
		ACEVES	MITEI	V	10/28/2011	C	U	B	9389	0	ACC	FL	388.00		HT		
		ACEVES	RICARDO		10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD		
		AGUILAR	JEANETTE		10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD		
		AGUILERA	ANA	J	10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD		
		ALBARRANSALINAS	MARIA	G	10/28/2011	C	U	C	0	0	B&S	FL	288.00		PD		
		ALBRIGHT	MEGAN	R	10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD		



Award Status Extract

567898205MILTON	JENNIFER	E19711026NC175844418227.5	B 1670		ACSS	1670
565439833ROMAN	AMY	P19850516NC175861614100	B 7142T/F	5472	ACSS	1670
580816087REYES	ADRIANA	O19850330NC175931094100	B 7142T/F	5472	ACSS	1670
687672303LEO	JESUS	P19720519NC176013053200	B 7142T/F	5472	ACSS	1670
649002369CETE	JEREMY	L19860124NC175899323200	B 7142T/F	5472	ACSS	1670
550220979GOOD	TONI	P1980729NC175993414100	B 1670		ACSS	1670
569877455TOMAS	LEILA	P19790620NC175932902200	B 7142T/F	5472	ACSS	1670
595551556RAMIREZ	BRITTANY	P19870903NC175811773200	B 7142T/F	5472	ACSS	1670
603280114FOU	ARTIA	P19890717NC175918411100	B 7142T/F	5472	ACSS	1670
629914380WEATHER	RICH	S19891229NC176005349200	B 7142T/F	5472	ACSS	1670

538068129	No record found or application not processed
556084282	No record found or application not processed
613187790	No record found or application not processed
625228110	No record found or application not processed
615160682	No record found or application not processed
512377814	No record found or application not processed
658208245	No record found or application not processed
564672006	No record found or application not processed
207600189	No record found or application not processed
388568210	No record found or application not processed
426272227	No record found or application not processed
466877382	No record found or application not processed
528895131	No record found or application not processed



Cal Grant C Supplement Recipient

CAL C SUPPLEMENT RECIPIENT REPORT
ACADEMIC YEAR 2014

FULLERTON COLLEGE - 00120100

08/15/2014

SSN	Last	First	MI	Address	City	State	Zip Code	CSupp Form
00000000	ORO	ED		320 VERMONT AVENUE	ANAHEIM	CA	928	N
00000000	VAZQUEZ	KEVIN		2432 CLIFHURST ST	ROWLAND HEIGHTS	CA	928	Y
00000000	RAMOS	FERNANDA		445 ARIEL PARK DRIVE	ANAHEIM	CA	928	Y
00000000	MENDEZ	JORGE		438 RASKIN DRIVE	ROWLAND HEIGHTS	CA	917	N
00000000	RAMIREZ	PETER		31 FIRST AVE	LA HABRA	CA	906	Y
00000000	CARRILLO	AL		533 WEST ST	PALM SPRINGS	CA	928	Y
00000000	SANTIAGO	ANIEE		3030 JACKSON AVE	YORBA LINDA	CA	928	N
00000000	PANH	JESS		13 MARIE DRIVE	FULLERTON	CA	928	N
00000000	TRAN	ANNE		1 EAST OLIVE AVE	ANAHEIM	CA	928	N
00000000	MARIN	CHRIS		322 WEATLH WAY APT A	LA HABRA	CA	928	N
00000000	SANCHEZ	FRANK		41 SUNRISE DR	PALM SPRINGS	CA	922	N
00000000	JAM	DON		20 S BAY WAY	YORBA LINDA	CA	928	N
00000000	HUY	DAN		162 BAKER AVE	LA HABRA	CA	928	N
00000000	VAL	REY		130 VALENCIA AVE	FULLERTON	CA	928	N
00000000	ESTRADAHERNANDEZ	ALEJANDRA		309 COMMON ST	FULLERTON	CA	928	N
00000000	TUAN	FAY		250 BROOK AVE	ANAHEIM	CA	928	N

Making education beyond high school financially accessible to all Californians.

E2 Verification

AHTN09	00131200	UNIV OF CA - BERKELEY	28apr17					
608202373	2016 00131200	NICOS	RICO	A	E15149070	B	1	150
611733155	2016 00131200	LOREN	BEN		E16356971	B	1	300
618388654	2016 00131200	MARTIN	LITA	A	E16365028	B	1	200
616216667	2016 00131200	BERNETT	SAM		E16346358	B	1	200
626748655	2016 00131200	GAZIZ	SHAE	S	E15166463	B	1	100



Education Level (EL) Verification

ELTN09	00131200UNIV OF CA - BERKELEY 28apr17						
613880854	2016	00131200	3	RISTON	KAMIE	19960128	B 5 Unable to verify
621509079	2016	00131200	3	RUILA	MICKA	19950307	B 5 Unable to verify
564554504	2016	00131200	4	NORTON	SONNY	19650416	B 5 Unable to verify
800244171	2016	00131200	3	ZION	MILA	19961225	B 5 Unable to verify
556678508	2016	00131200	3	MONAN	DELANIE	19710521	B 5 Unable to verify
620644777	2016	00131200	3	ROSS	BETH	19861105	B 5 Unable to verify
617237510	2016	00131200	3	PARKER	BEN	J 19730908	B 5 Unable to verify
608841487	2016	00131200	3	MANER	DINA	I 19950728	B 5 Unable to verify
603359926	2016	00131200	3	GATES	MANU	19881105	B 5 Unable to verify
607922134	2016	00131200	3	BARREZ	RITA	19960815	B 5 Unable to verify
619724562	2016	00131200	3	MEREAU	ELICIA	N 19861221	B 5 Unable to verify
886336856	2016	00131200	3	KADO	SUNY	19930115	B 5 Unable to verify
607843310	2016	00131200	3	MAKER	MALI	19950708	B 5 Unable to verify



Education Level (EL) Verification Accept/Reject

SABELAR BATCH DATE: 01/23/2015		CALIFORNIA STUDENT AID COMMISSION EL VERIFICATION ACCEPT REJECT REPORT ACADEMIC YEAR 2014		PAGE: 1 RUN DATE: 01/23/2015 RUN TIME: 18:41:44
ACCEPTED SECTION		00131300		
SSN NBR	EL CODE	EL VERIFICATION STATUS		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	3	4--Verified with change		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	4	4--Verified with change		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
SABELAR BATCH DATE: 08/22/2014		CALIFORNIA STUDENT AID COMMISSION EL VERIFICATION ACCEPT REJECT REPORT ACADEMIC YEAR 2014		PAGE: 15 RUN DATE: 08/22/2014 RUN TIME: 18:18:38
REJECTED SECTION		00131300 - UNIV OF CA - DAVIS		
SSN NBR	EL CODE	EL VERIFICATION STATUS - REJECT REASON		
00000000	3	3--Verified as reported School is not allowed to verify student EL code		
00000000	3	3--Verified as reported Invalid award status code		



Monthly Payment Activity Report

1 SABRMPA1 - 01		CALIFORNIA STUDENT AID COMMISSION		PAGE NO: 1	
		PAYMENT ACTIVITY REPORT		RUN DATE: 11/19/2011	
		ACCOUNTING SUMMARY		RUN TIME: 03:40:30	
		ACADEMIC YEAR 2011			
		00111100 - ALLAN HANCOCK COLLEGE			
DATE	ACTIVITY	FUNDS DISBURSED TO INSTITUTION	PAYMENT TRANSACTIONS	BALANCE	
----	-----	-----	-----	-----	
08-23-11	FALL ADVANCE	141,653.00		141,653.00	
08-26-11	FALL RECONCILED PAYMENT TRANSACTIONS		0.00	141,653.00	
09-02-11	FALL RECONCILED PAYMENT TRANSACTIONS		0.00	141,653.00	
10-07-11	FALL RECONCILED PAYMENT TRANSACTIONS		0.00	141,653.00	
10-28-11	FALL RECONCILED PAYMENT TRANSACTIONS		260,346.00	-118,693.00	
10-28-11	RECONCILED PAYMENT TO INSTITUTION	118,693.00		0.00	
11-04-11	FALL RECONCILED PAYMENT TRANSACTIONS		704.00	-704.00	
11-04-11	RECONCILED PAYMENT TO INSTITUTION	704.00		0.00	
11-18-11	FALL RECONCILED PAYMENT TRANSACTIONS		1,374.00	-1,374.00	
11-18-11	RECONCILED PAYMENT TO INSTITUTION	1,374.00		0.00	
	TOTAL FUNDS DISBURSED / TOTAL PAYMENTS	262,424.00	262,424.00		

	YEAR-TO-DATE ACTIVITY				
	FALL	WINTER	SPRING	SUMMER	TOTAL
CAT/F	0.00	0.00	0.00	0.00	0.00
CBT/F	0.00	0.00	0.00	0.00	0.00
CBACC	255,692.00	0.00	0.00	0.00	255,692.00
CBTOTAL	255,692.00	0.00	0.00	0.00	255,692.00
CCI/F	0.00	0.00	0.00	0.00	0.00
CCB/S	6,732.00	0.00	0.00	0.00	6,732.00
CCITOTAL	6,732.00	0.00	0.00	0.00	6,732.00
GFT/F	0.00	0.00	0.00	0.00	0.00
TOTAL	262,424.00	0.00	0.00	0.00	
GRAND TOTAL					262,424.00

Making education beyond high school financially accessible to all Californians.



School Change Upload

SABCSCT CALIFORNIA STUDENT AID COMMISSION PAGE: 5
BATCH DATE: 06/20/2014 SCHOOL CHANGE DATA FILE UPLOAD REPORT RUN DATE: 06/20/2014
ACADEMIC YEAR 2014 RUN TIME: 17:38:05

00131300 - UNIV OF CA - DAVIS

00000000 FL Student is not present in the roster
00000000 FL Invalid SSN
00000000 FL Student is not present in the roster
00000000 FL Student is not present in the roster
00000000 FL Invalid SSN
00000000 FL Invalid SSN
00000000 FL Student is not present in the roster
00000000 FL Invalid SSN
00000000 FL Student is not present in the roster
00000000 FL Student is not present in the roster
00000000 FL There are no record in grant application table for this SSN
00000000 FL Student is not present in the roster
00000000 FL This Entitlement Transfer record is on-hold awaiting the return of the (G6) Transfer Entitlement Cal Grant Certification form. Once the information is verified the record will be released for school change by Commission staff.

Record Counts

Number of records read..... 1382
Number of records converted to school change transactions..... 1213
Number of records that could not be converted to school change transactions 168
Number of blank records..... 1

*** END OF REPORT ***



Unclaimed Awards

ucar-2016-00131300-21apr17.txt
BATCH DATE: 04/21/2017

CALIFORNIA STUDENT AID COMMISSION
UNCLAIMED AWARDS FOR UNIV OF CA - DAVIS (00131300)
ACADEMIC YEAR 2016

PAGE: 1
RUN DATE: 04/22/2017
RUN TIME: 01:35:27

SSN	LAST NAME	FIRST NAME	M BIRTH I DATE	CYCLE ID	PROG CODE	NEW/ REN	CURRENT SCHOOL	LOA ADDRESS
000010524	NAVA	ARIA	G 12/01/1992	E2	B	R	Y	91 NORMINGTON CT STOCKTON, CA 95207 NAVAMARIA@GMAIL.COM
000040110	HERRON	FRED	C 08/31/1994	E1	B	R	Y	838 EUREKA AVENUE SPC. 20 YUBA CITY, CA 95991 HGNA@HOTMAIL.COM
000024311	AQUINO	ZAIR	Y 04/16/1993	E2	B	N	Y	280 GREENSBORO DRIVE SACRAMENTO, CA 95833 ZAIR@GMAIL.COM
000014612	RENO	ERIKA	C 01/01/1993	E2	B	N	Y	261 ADELA AVENUE DAVIS, CA 95616 VC21@GMAIL.COM
000066120	ANTON	VICTOR	12/31/1990	E2	B	N	Y	173 WILBUR STREET APT.8 CONCORD, CA 94520 APA412@HOTMAIL.COM

Tools

Making education beyond high school financially accessible to all Californians.



Helpful Strategies

- Save the tools into a folder on your computer for easy access
- Save the desired data file report(s) to your computer
- Import the data file report into the appropriate tool






Locating tools in WebGrants

California Student Aid Commission (SAPRD)
WebGrants System

[Tools](#) [Help](#) [Sign Out](#)

**Welcome! SA3JXW**
To the CSAC Portal Menu

The last time you logged on to this system was: 03/30/2012 09:31:44 am
Number of failed attempts since your last login: 0

Please contact your School's System Administrator if you need access to additional screens.

Portal Menu	Account Information
WebGrants Table Edit User Administration	View Your Account Details Help With Your Account



The Tools Page in WebGrants

Tools	
<ul style="list-style-type: none">✦ *Note: Systems that have upgraded to Microsoft Office Excel 2007 will encounter a file format error while exporting HTML in Excel format with an extension (xlsm). For best results download the "Template for Excel 2007" to your computer. *See under "Description" for saving the converted template to your computer✦ Each of these tools involves downloading files that use external software. Some require that additional software be resident on the user's computer✦ For best results, right click on the link and select the "Save" option.✦ A Users Guide containing further descriptions and instructions for each of these tools is located in the Help Center	
Tools	Description
✦ Roster Data File Compare -- Delphi	Provides comparisons between a previous roster data file and the current file
✦ Excel Grant Roster Template -- for Excel '97	Formats roster data files into a Microsoft Excel spreadsheet
✦ Excel Grant Roster Template -- for Excel 2000	Formats roster data files into a Microsoft Excel spreadsheet
✦ Excel Grant Roster Template -- for Excel 2007	<p>*Right-click the link "Excel Grant Roster Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xlsm) and save</p>



Available Tools in WebGrants

- **Roster Data File Comparison-** Provides comparisons between a previous roster data file and the current file
- **Grant Roster Template-** Formats roster data files into a Microsoft Excel Spreadsheet
- **Reconciliation Template-** Formats reconciliation data files into a Microsoft Excel spreadsheet
- **EL Verification Template-** Formats EL Verification data files into a Microsoft Excel spreadsheet
- **Unclaimed Awards Template-** Formats Unclaimed award data files into a Microsoft Excel spreadsheet

Data Files for Templates

Template	Data File
Grant Roster	Grant Roster
Reconciliation	Reconciliation Detail Data*
Education Level Verification	Education Level Verification
Unclaimed Awards	Unclaimed Awards

All data file can be located under Data Transfer > Report Download

*This file is located under Roster/Reconciliation > Display Reconciliation

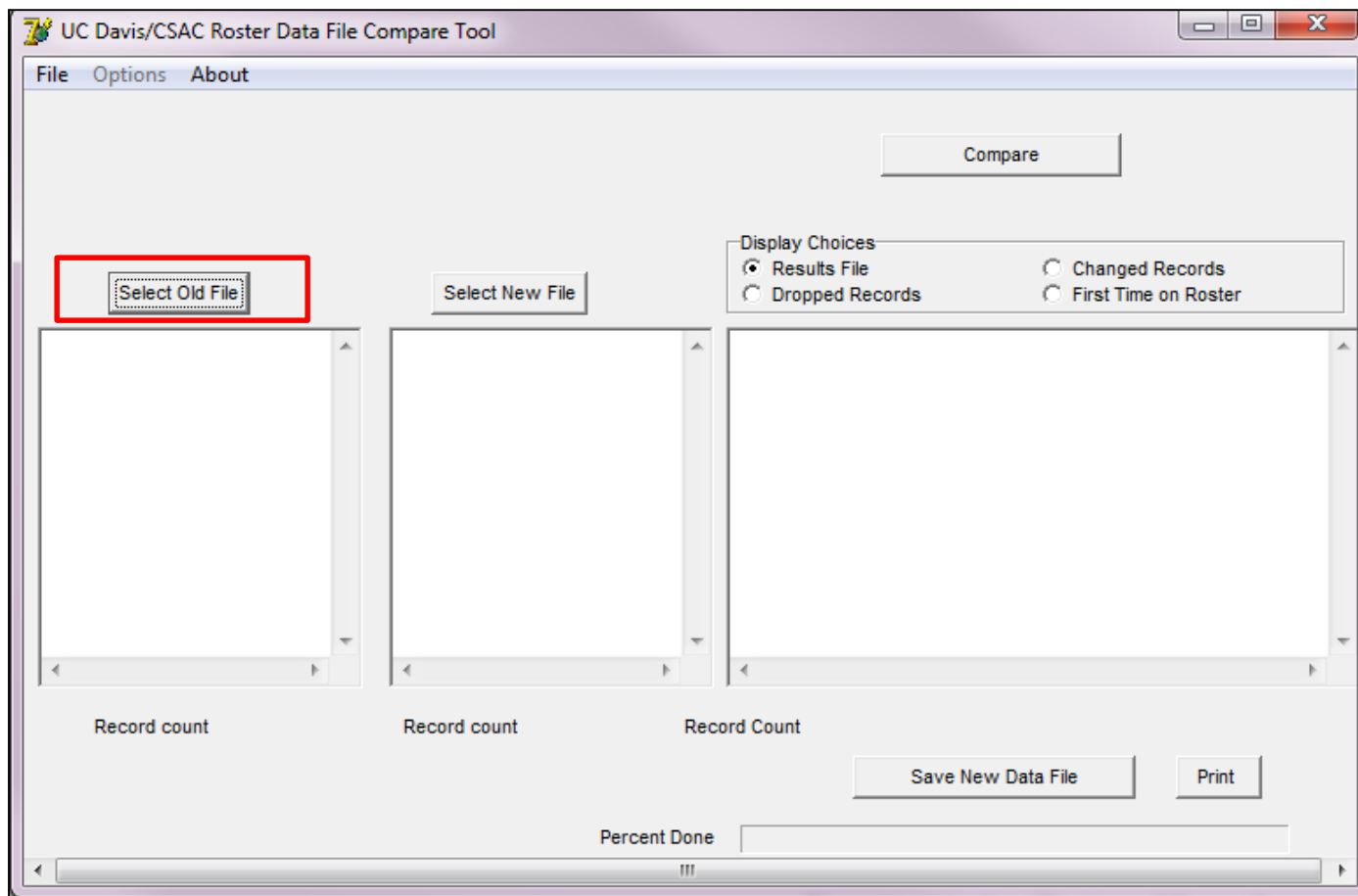


Roster Data File Compare

Making education beyond high school financially accessible to all Californians.



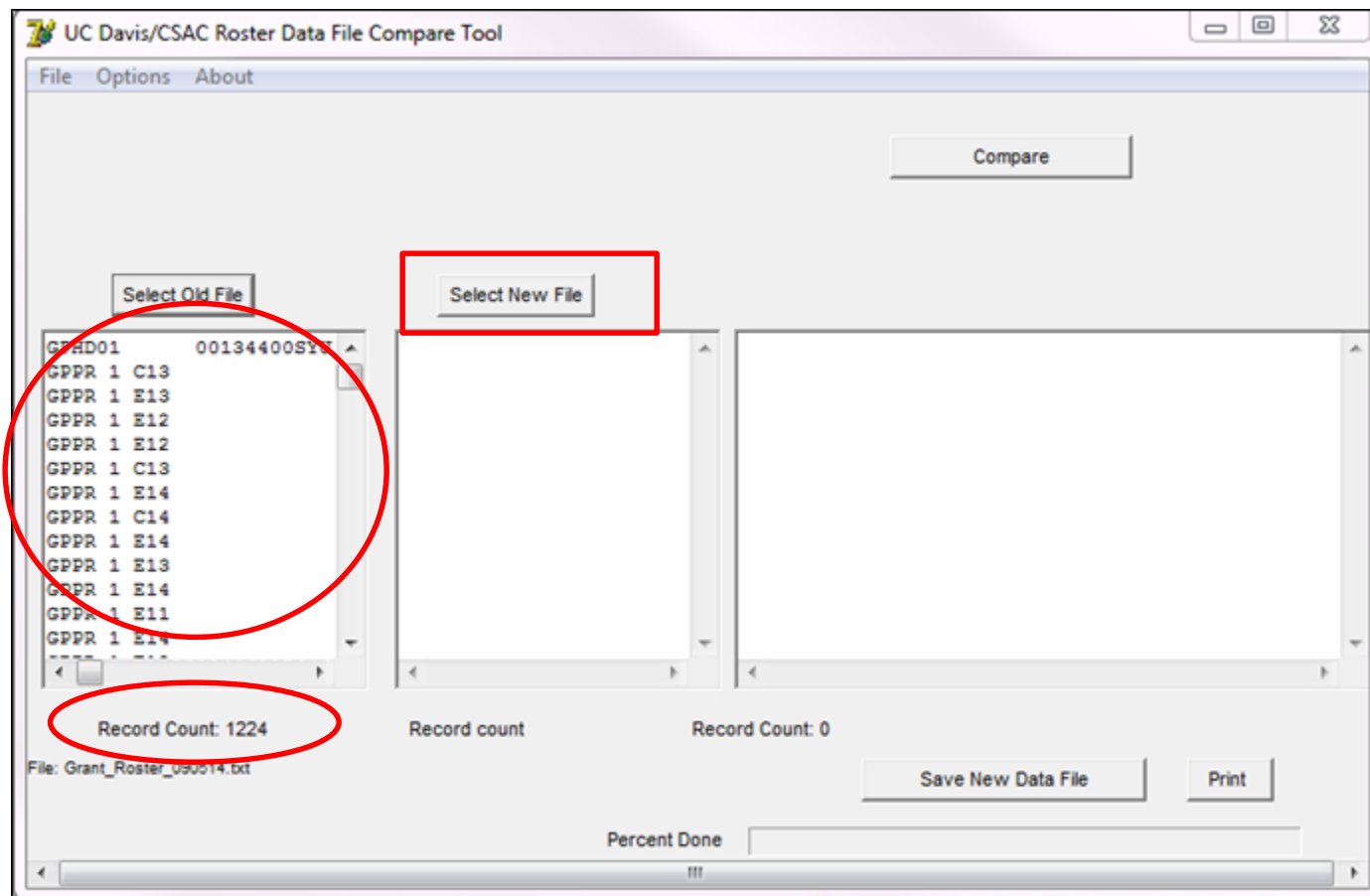
Roster Data File Compare



Making education beyond high school financially accessible to all Californians.



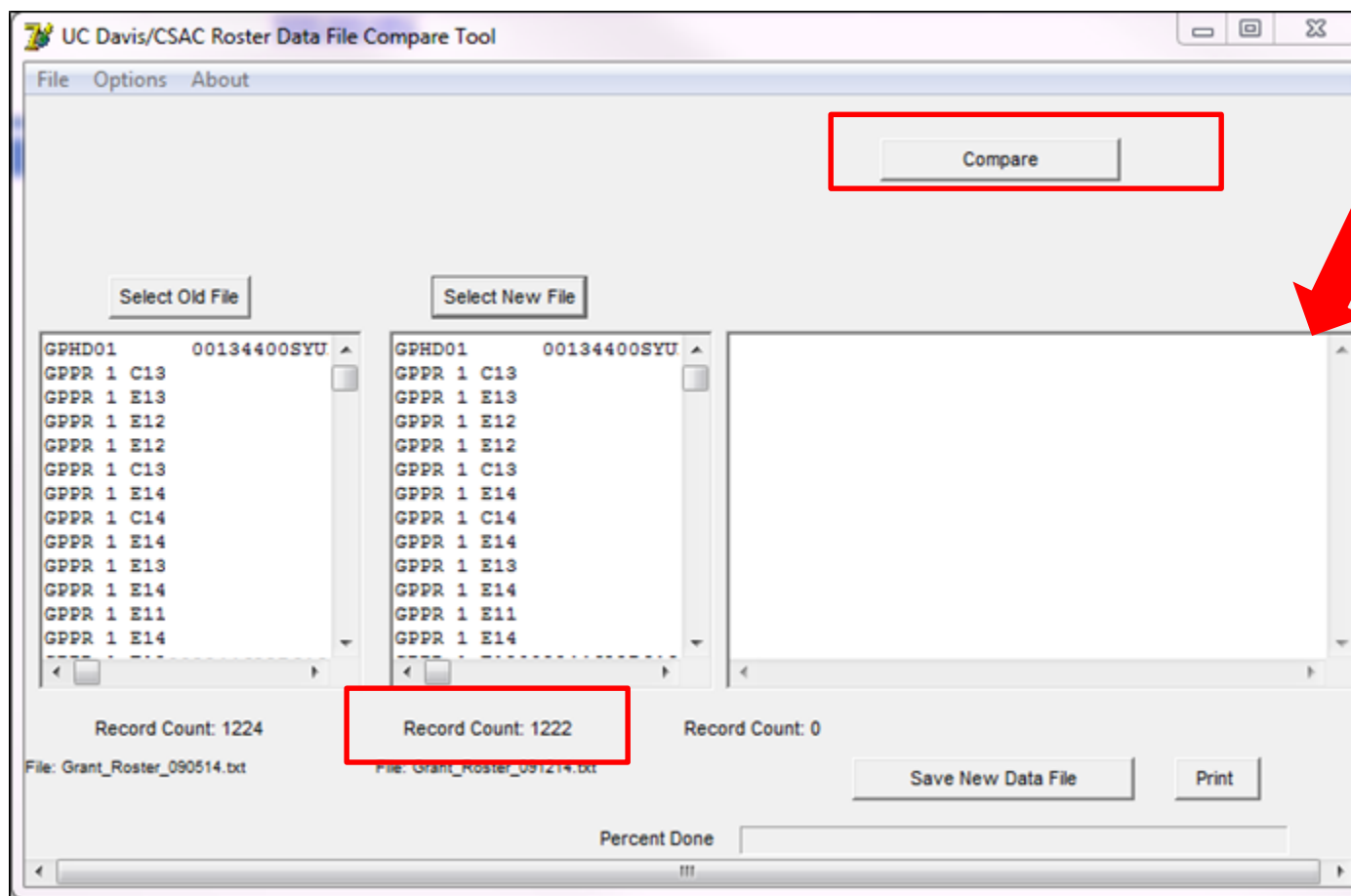
Roster Data File Compare



Making education beyond high school financially accessible to all Californians.



Roster Data File Compare



Making education beyond high school financially accessible to all Californians.



Roster Data File Compare

The screenshot shows the 'UC Davis/CSAC Roster Data File Compare Tool' window. It features a menu bar with 'File', 'Options', and 'About'. A 'Compare' button is at the top right. Below it are 'Select Old File' and 'Select New File' buttons. A red box highlights the 'Display Choices' section, which contains four radio buttons: 'Results File', 'Dropped Records' (selected), 'Changed Records', and 'First Time on Roster'. The main area has three text boxes displaying roster data. The first two boxes show a list of records with IDs like 'GPHD01' and '00134400SYU'. The third box shows a list of records with names like 'MALDONADO' and 'VILLA'. At the bottom, there are buttons for 'Save Dropped Data' and 'Print', and a 'Percent Done' progress bar.

UC Davis/CSAC Roster Data File Compare Tool

File Options About

Compare

Select Old File Select New File

Display Choices

- ☐ Results File
- ☒ Dropped Records
- ☐ Changed Records
- ☐ First Time on Roster

Record Count: 1224 Record Count: 1222 Drop Records: 2

File: Grant_Roster_090514.txt File: Grant_Roster_091214.txt

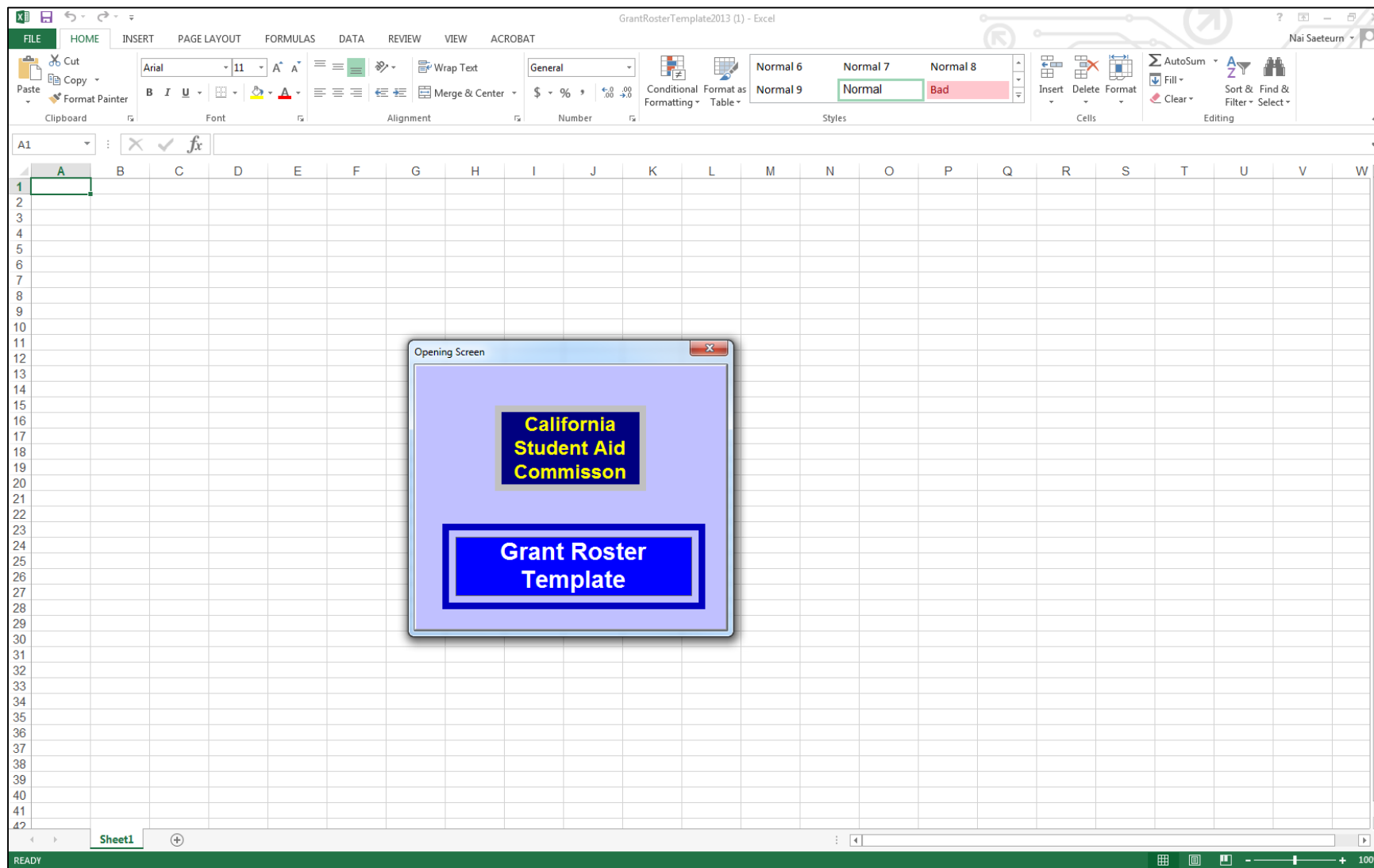
Save Dropped Data Print

Percent Done

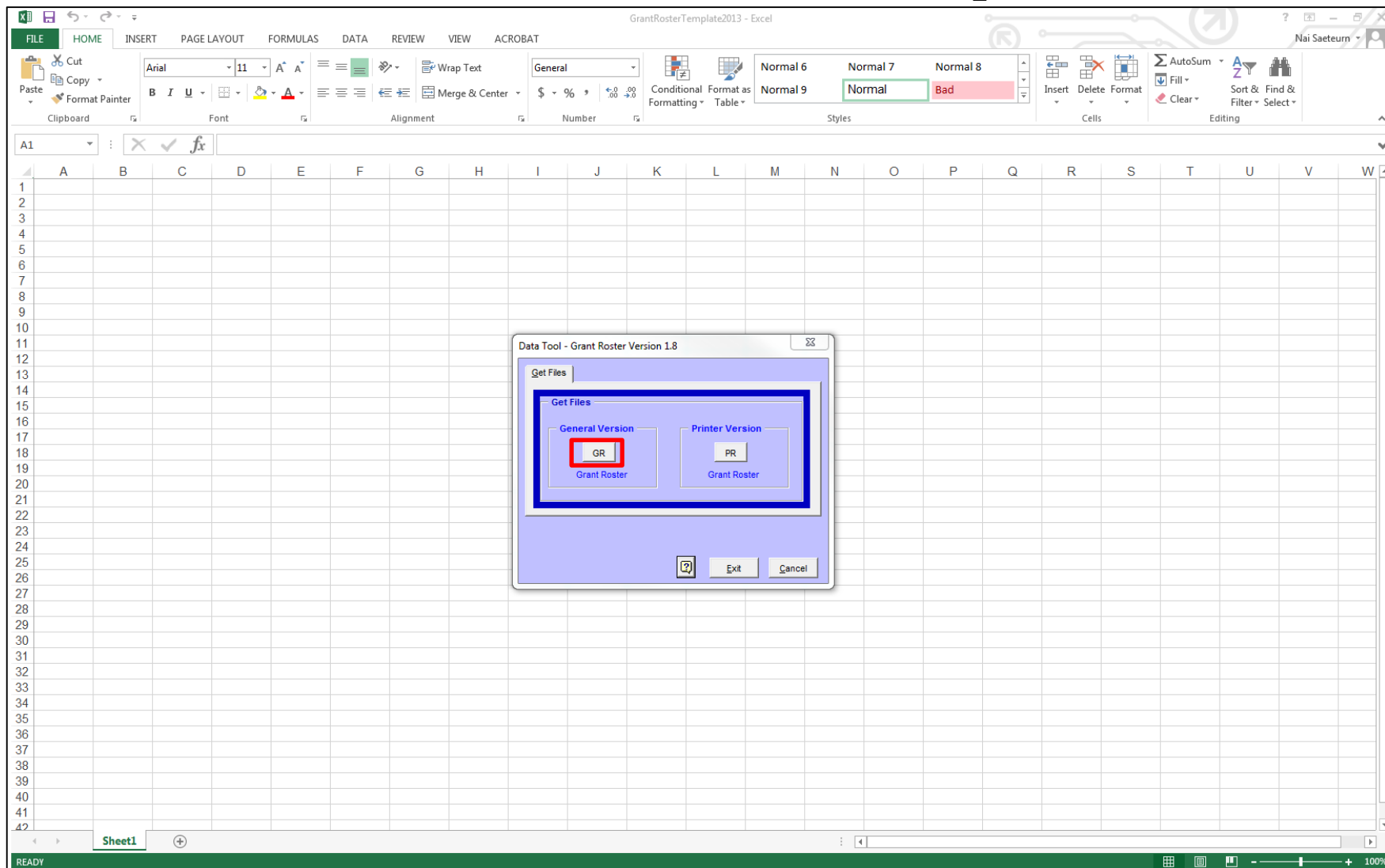
Grant Roster Template

Making education beyond high school financially accessible to all Californians.

Grant Roster Template

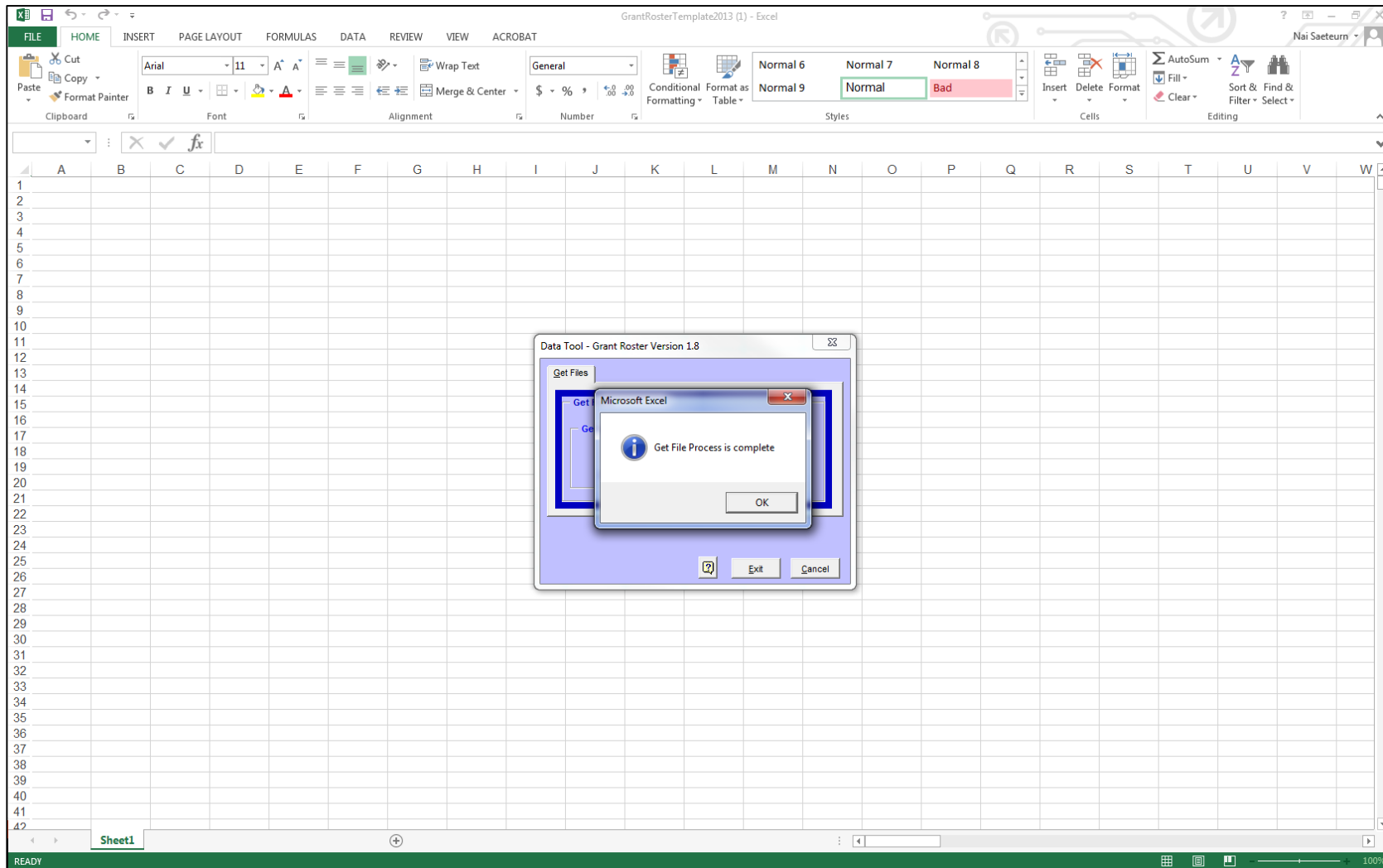


Grant Roster Template



The screenshot displays the Microsoft Excel interface with the 'GrantRosterTemplate2013 - Excel' file open. The ribbon is set to the 'HOME' tab, showing various formatting options like font, alignment, and styles. The worksheet grid is visible, with columns A through W and rows 1 through 42. A dialog box titled 'Data Tool - Grant Roster Version 1.8' is open in the center of the screen. This dialog box has a 'Get Files' tab and contains two main sections: 'General Version' and 'Printer Version'. In the 'General Version' section, there is a button labeled 'GR' (Grant Roster) which is highlighted with a red rectangle. In the 'Printer Version' section, there is a button labeled 'PR' (Printer Version). At the bottom of the dialog box, there are buttons for 'Exit' and 'Cancel'. The status bar at the bottom of the Excel window shows 'Sheet1' and 'READY'.

Grant Roster Template





Reconciliation Template

Making education beyond high school financially accessible to all Californians.




Reconciliation Template

Display Reconciliation

- ✦ Select either Report or Data file from Display Type. For Report, selecting **Detail** will produce student level information; **Summary** will provide totals. You may select either or both of the **Report** boxes.
- ✦ Reports will display in a text file format. They can be printed using your Web browser.
- ✦ Data Files will display in a text file format and may be saved to your computer. The Tools Menu contains a program that will format the data file using Excel.
- ✦ If you are using Netscape, select the Display/Download link to view. Then use your browser **Save** option to download.


Display Type: Detail Report ☐ Summary Report ☐ Detail Data ☐

School ID = Acad Year = 2017-2018 ▼ Format = CSAC Standard Reconciliation ▼ 

Basic Report Filter for CSAC Standard Format Only

The purpose of this secondary filter is to provide schools with a basic reconciliation tool. After viewing the Reconciliation Summary and identifying areas of discrepancy, schools can use the filter options below to obtain student level data for each summary subtotal.

- ✦ Select the combination of Term, Program Code and Award Type that matches the subtotal or total you are trying to verify. (For more complex filters, use the Customize feature.)

Basic Report Filter: Term Program Code Award Type 





Reconciliation Template

◆ [Excel Reconciliation Template](#)

Formats reconciliation data files into a Microsoft Excel spreadsheet

◆ [Excel Reconciliation Template --
for Excel 2007](#)

*Right-click the link "Excel Reconciliation Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xlsm) and save

◆ [Excel Reconciliation Template ---
Excel 2010](#)

Formats reconciliation data files into a Microsoft Excel spreadsheet

◆ [Excel Reconciliation Template ---
Excel 2013](#)

Formats reconciliation data files into a Microsoft Excel spreadsheet



Reconciliation Template

	A	B	C	D	E	F	G	H	I	J	K
1	Last Name	First Name	Middle Initial	Social Security	Grant ID	Cycle ID	New/Renewal	Student EL	School Program	Term	Grant Program
2											
3											
4											
5											

L	M	N	O	P	Q	R	S	T
Award Type	Pay Status	Adjustment Amt	Adjustment Reason	Adjustment Date	Disbursement Amt	Eligibility Used	Create Date	Pay Status Date



EL Verification Template





Unclaimed Awards Template



Cal ISIR Tool





California Dream Act ISIRs

California Student Aid Commission
WebGrants System

[Portal Menu](#) [WebGrants](#) [Tools](#) [Help](#) [Sign Out](#)

[GPA](#) [Student Info](#) [School Info](#) [Roster/Reconciliation](#) [Data Transfer](#) [Chafee Grant](#) [NON-SSN GPA](#)

[Data Transfer](#) [File Upload](#) [Report Download](#)

Data Transfer Menu
[File Upload](#)
[Report Download](#) 

[Privacy Policy](#) Copyright 2000-2013, California Student Aid Commission [Contact Us](#)
Revision: 9 Date: 12/14/2009 11:43:03 AM



California Dream Act ISIRs

California Student Aid Commission (SAPRD)

[Portal Menu](#) [WebGrants](#) [Tools](#) [Help](#) [Sign Out](#)

WebGrants System

[Enrollment](#) [GPA](#) [Student Info](#) [School Info](#) [Roster/Reconciliation](#) [Data Transfer](#) [Chafee Grant](#) [Accounting](#) [NON-SSN GPA](#)

[Data Transfer](#) [File Upload](#) [Report Download](#) [SSN/ID Main](#)

Report Download

- ▶ To download or display a report or data file click on the Retrieve File button.
- ▶ All data columns can be sorted either ascending or descending order by clicking on the blue column headings.
- ▶ To compare two roster files, select Grant Roster for Report and Data File for Media Type.
- ▶ To delete uploaded Audit Files, select Audit File for Report and the Delete checkbox column will appear.

School ID =

Acad Year = 2016-2017 ▼

Month = All ▼

Report = All ▼

Media Type = All ▼



[Privacy Policy](#) Copyright 2000-2016, California Student Aid Commission [Contact Us](#)

Revision: 13 Date: 2/4/2015 10:25:08 AM

Making education beyond high school financially accessible to all Californians.



California Dream Act ISIRs

California Student Aid Commission (SAPRD) [Portal Menu](#) [WebGrants](#) [Tools](#) [Help](#) [Sign Out](#)

WebGrants System [Enrollment](#) [GPA](#) [Student Info](#) [School Info](#) [Roster/Reconciliation](#) [Data Transfer](#) [Chafee Grant](#) [Accounting](#) [NON-SSN GPA](#)

[Data Transfer](#) [File Upload](#) [Report Download](#) [SSN/ID Main](#)

Report Download for CSU SACRAMENTO

- To download or display a report or data file click on the Retrieve File button.
- All data columns can be sorted either ascending or descending order by clicking on the blue column headings.
- To compare two roster files, select Grant Roster for Report and Data File for Media Type.
- To delete uploaded Audit Files, select Audit File for Report and the Delete checkbox column will appear.

School ID = 00115000

Acad Year = 2016-2017 ▼

Month = All ▼

Report = California Dream Act ISIRs ▼

Media Type = All ▼

GO!

Report Date ▼	Description	Media Type	Month	
24-JAN-16	California Dream Act ISIRs	Data File	JAN	Retrieve File
17-JAN-16	California Dream Act ISIRs	Data File	JAN	Retrieve File



Customizing Your Roster

Making education beyond high school financially accessible to all Californians.



Customizing Your Roster

California Student Aid Commission (SAPRD)

[Portal Menu](#) [WebGrants](#) [Tools](#) [Help](#) [Sign Out](#)

WebGrants System

[Enrollment](#) [GPA](#) [Student Info](#) [School Info](#) [Roster/Reconciliation](#) [Data Transfer](#) [Chafee Grant](#) [Accounting](#)
[NON-SSN GPA](#)

[Roster/Reconciliation](#) [Customize Roster](#) [Display Roster](#) [Print Roster](#) [Customize Reconciliation](#) [Display Reconciliation](#)
[Display Accept / Reject Report](#)

Roster Menu

[Customize Roster](#)
[Display Roster](#)
[Print Roster](#)

Reconciliation

[Customize Reconciliation](#)
[Display Reconciliation](#)
[Display Accept / Reject Report](#)

Making education beyond high school financially accessible to all Californians.



Customizing Your Roster


California Student Aid Commission (TEST1)[Portal Menu](#)[WebGrants](#)[Tools](#)[Help](#)[Sign Out](#)


WebGrants System[Enrollment](#)[GPA](#)[Student Info](#)[School Info](#)[Roster/Reconciliation](#)[Data Transfer](#)[Chafee Grant](#)[Accounting](#)[Web Service Registration](#)[NON-SSN GPA](#)

[Roster/Reconciliation](#)[Customize Roster](#)[Display Roster](#)[Print Roster](#)[Customize Reconciliation](#)[Display Reconciliation](#)[Display Accept / Reject Report](#)[Override Supplement Payment](#)

Customize Roster

- ♦ The following is a list of your roster formats.
- ♦ The CSAC Standard Roster format can not be changed or deleted.
- ♦ Existing roster formats can be copied, edited and renamed.
- ♦ Any roster format can be chosen as the "Preferred Format." The Preferred Format will display automatically when "Display Roster" is selected from the Roster Main menu.



Row #	Name	Preferred Format	Edit	Delete
1	CSAC Standard Roster	<input type="radio"/>		



Customizing Your Roster

Roster Format Title

Roster Format **Preferred** ☐ Yes ☒ No

Select Data Elements and Column Order

- "Data Elements Available" contains a list of all available roster elements.
- Click and highlight each data element that you wish to display on your roster.
- For multiple selections, click on the first element and then hold down the CTRL key to select additional elements.
- Once items are highlighted, click on "Add Data Element(s)".
- The "Data Elements Selected" box will reflect the column headings that will display on your roster format.
- "Remove Data Element(s)" will delete the selected elements from your selection list.
- Use the "Move Up" and "Move Down" to order the individual column headings for display.
- After selecting data elements, click "Continue" to choose sort options.

Data Elements Available

Add Data Element(s)

Remove Data Element(s)

Data Elements Selected

SSN
DOB
Grant ID
Cycle ID
Housing Code
Dep Status
New / Renewal
EL Code
CSAC Budget
EFC

Move Up

Move Down



Customizing Your Roster

Select Data Elements and Column Order

- "Data Elements Available" contains a list of all available roster elements.
- Click and highlight each data element that you wish to display on your roster.
- For multiple selections, click on the first element and then hold down the CTRL key to select additional elements.
- Once items are highlighted, click on "Add Data Element(s)".
- The "Data Elements Selected" box will reflect the column headings that will display on your roster format.
- "Remove Data Element(s)" will delete the selected elements from your selection list.
- Use the "Move Up" and "Move Down" to order the individual column headings for display.
- After selecting data elements, click "Continue" to choose sort options.

Data Elements Available

Add Data Element(s)

Remove Data Element(s)

Data Elements Selected

SSN
DOB
Grant ID
Cycle ID
Housing Code
Dep Status
New / Renewal
EL Code
CSAC Budget
EFC

Move Up

Move Down

Select Terms

- Select the term(s) you wish to display
- Selecting only one(1) term will allow users to sort records by term-specific data elements
- After selecting term(s), click "Continue" to choose sort options



Customizing Your Roster

Select Terms

- Select the term(s) you wish to display
- Selecting only one(1) term will allow users to sort records by term-specific data elements
- After selecting term(s), click "Continue" to choose sort options

☐ Fall☐ Winter☐ Spring☐ Summer

Continue

Define Sort Order Preferences

Click drop down boxes to choose elements for sort.

First Sort Preference	Roster Section	Ascending
Second Sort Preference	Last Name	Ascending
Third Sort Preference	First Name	Ascending
Fourth Sort Preference	Middle Initial	Ascending
Fifth Sort Preference	SSN	Ascending
Sixth Sort Preference		Ascending

Define Selection Criteria

- Check boxes below to limit the records you wish to display.
- A checked box means that only records with those values will be included. (If no box or every box is checked in a category, you will see all those records for your school.)



Customizing Your Roster

Define Selection Criteria

Check boxes below to limit the records you wish to display.
A checked box means that only records with those values will be included. (If no box or every box is checked in a category, you will see all those records for your school.)

Cycle ID	<input type="checkbox"/> E1	<input type="checkbox"/> E2	<input checked="" type="checkbox"/> C1	<input checked="" type="checkbox"/> C2
Award Type	<input type="checkbox"/> Tuition/Fees	<input type="checkbox"/> Access	<input type="checkbox"/> Books & Supplies	
Housing Code	<input type="checkbox"/> On Campus (1)	<input type="checkbox"/> Off Campus (2)	<input type="checkbox"/> With Parents (3)	
Dependency Status	<input type="checkbox"/> Dependent	<input type="checkbox"/> Independent		
EL (Education Level)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4 <input type="checkbox"/> 5+
EL Status	<input type="checkbox"/> Verification Not Required (1)		<input type="checkbox"/> Not Paid, Verif Required (2)	
	<input type="checkbox"/> Verified As Reported (3)		<input type="checkbox"/> Verified with Change (4)	
	<input type="checkbox"/> Unable to Verify (5)		<input type="checkbox"/> Paid, Verification Required (6)	
New/Renewal Students	<input checked="" type="checkbox"/> New	<input type="checkbox"/> Renewal		
Program Code	<input type="checkbox"/> A	<input checked="" type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> T
Section	<input checked="" type="checkbox"/> Eligible	<input checked="" type="checkbox"/> CC Reserve	<input checked="" type="checkbox"/> Ineligible	<input type="checkbox"/> Not In Attendance
Extra Eligibility	<input type="checkbox"/> TCP	<input type="checkbox"/> 5th Year	<input type="checkbox"/> Not TCP nor 5th Year	
E1 On Hold Status	<input type="checkbox"/> Verification Required		<input checked="" type="checkbox"/> Verification Completed	
	<input type="checkbox"/> Verification Not Required			
E2 On Hold Status	<input type="checkbox"/> Waiting for G6 Return		<input type="checkbox"/> Requires Verification by School	
	<input type="checkbox"/> School Verified Eligible		<input type="checkbox"/> School Verified Ineligible	

Save Roster Format

Making

ornians.



Customizing Your Roster

Online Roster

- Be sure to save all entries before exiting the Roster or changes will be lost.
- Please note that Leave of Absence (LA) payment transactions for newly awarded Competitive Cal Grant students will not be accepted. Only student initiated LA transactions will be accepted via WebGrants for Students or by contacting CSAC.**

School ID =	<input type="text"/>	Acad Year =	2017 - 2018 ▼	Format =	CSAC Standard Roster ▼	Search =	SSN ▼	<input type="text"/>	GO!
					CSAC Standard Roster				
					New Unpaid Comp CGB				

[Privacy Policy](#) Copyright 2000-2017, California Student Aid Commission [Contact Us](#)
Revision: 35 Date: 8/21/2014 1:59:38 PM



Questions?

Making education beyond high school financially accessible to all Californians.

California Student Aid Commission

Reconciliation



Reconciliation

Making education beyond high school financially accessible to all Californians.



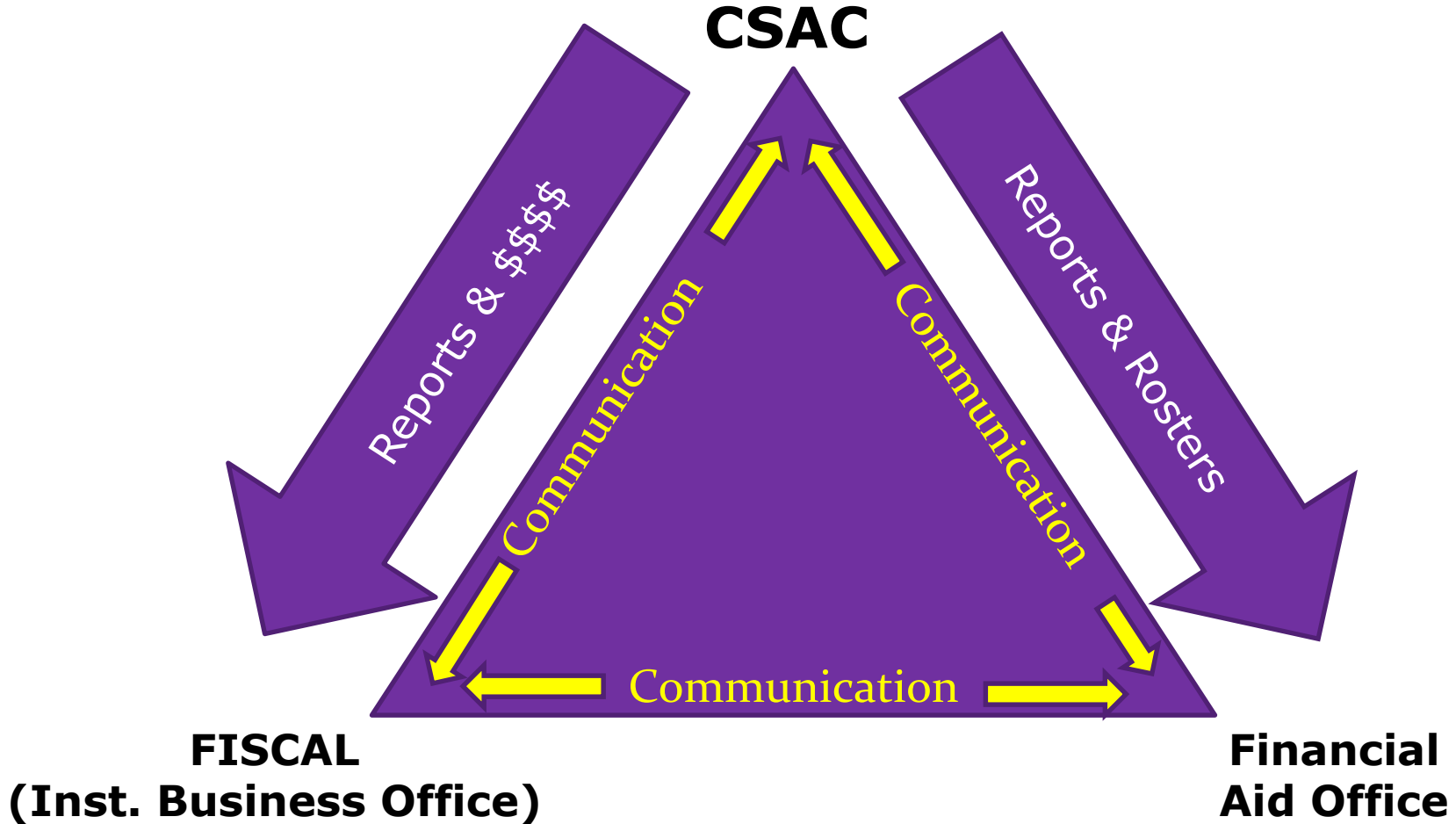
What is Reconciliation?

- Verification that all Cal Grant funds have been disbursed to each student in the correct amounts
- Confirmation that all payments have been properly reported to the Commission





What is Reconciliation?



Making education beyond high school financially accessible to all Californians.

Payment Period Reconciliation

Per the 2017-21 Cal Grant Institutional
Participation Agreement:

"Institutions are required to reconcile payments no later than 60 calendar days after the end of the payment period."

"Reconciliation does not preclude adjustments or payments after that date."

2017 Reconciliation Timeline

<u>Month</u>	<u>Description</u>
August 2017– June 2018	Payment Period
July 2018 – September 2018	Correction period
September 6, 2018	Final Reconciliation
Late September 2018	Invoicing for excess funds
October 2018	Beginning of penalty letters



4 Steps for Accurate Reconciliation



Making education beyond high school financially accessible to all Californians.

4 Steps to Accurate Reconciliation

1. Ensure that payment and student statuses are reported to the Commission correctly
2. Account for funds received from CSAC
3. Verify accuracy of disbursement amounts for each student
4. Ensure that any remaining funds are returned to the Commission after Final Reconciliation

The background of the slide is a stylized illustration of a desk. It features a clipboard with a checklist (one item is marked with a red 'X'), a red coffee cup, a pencil, and a pair of glasses. A large, semi-transparent purple rectangle is centered over the desk, containing the text for Step 1.

Step 1

Ensure Payment and
Student Statuses
were Reported
Correctly



Ensure Payments are Reported

- Report payments in WebGrants
 - Adjust payments for attendance status
 - ❑ Full Time (FT)
 - ❑ Half Time (HT)
 - ❑ Three Quarter Time (TT)
- Adjust tuition awards for students who withdraw from the institution
- Watch for limited eligibility situations





Common Reporting Errors

- Disbursing funds to a student without reporting the payment in WebGrants
- Reporting a payment for a student who is not in attendance at your school
- Reporting incorrect dollar amount





Step 2

Account for funds
received from CSAC



Account for Funds Received

- Check with Business Office
- Check Monthly Payment Activity Report
- If any questions about Electronic Funds Transfer (EFT), contact the Commission

EFT@csac.ca.gov





Supplemental Payments

- When all Cal Grant funds are exhausted:
 - Supplemental Funds sent automatically via EFT or warrant to institution
 - Supplemental payments appears on the Monthly Payment Activity Report





Step 3

Verify Accuracy of
Disbursement
Amounts for Each
Student





Verify Disbursements

- Ensure that payments reported to the Commission accurately reflect the amount disbursed to each student
 - Check for reconciled payments or adjustments (RP/RA) on a weekly basis (**Accept/Reject Report**)
- Utilize the **Reconciliation Summary Report** and **Detailed Data Report** to compare against your accounting ledger reports

The background of the slide is a stylized illustration of a desk. It features a clipboard with a checklist (one item is marked with a red 'X'), a red coffee cup, a pencil, and a pair of glasses. A large, semi-transparent purple rectangle is centered over the desk, containing the text for Step 4.

Step 4

Ensure That
Remaining Funds are
Returned to
Commission



Final Reconciliation



- September following the award year
- All roster payment adjustments and corrections should be done prior to September 6th
- Excess funds must be returned to the Commission
 - ☐ May not be applied to any other student
 - ☐ May not be carried over to next award year
- Invoices sent to institutions in late September and are due within 30 days
- Any dispute regarding invoice will not be reviewed until invoice is paid in full



Returning funds for a Closed Academic Year

- Submitted via check made out to the California Student Aid Commission
- Include a letter of explanation that contains:
 - ❑ Student Name
 - ❑ CSAC ID Number
 - ❑ Term for which funds are bring returned
 - ❑ Amount
 - ❑ Contact information
- Mail to:
California Student Aid Commission
Fiscal and Administrative Services Division
P.O. Box 419026
Rancho Cordova, CA 95741-9026





Things to DO and NOT DO

DO

- ✓ Make adjustments in WebGrants
- ✓ Check reports (i.e. Monthly Payment Activity, Accept / Reject)
- ✓ Send check upon receipt of invoice at close of academic year
- ✓ Attach proper documentation with refunds
- ✓ Train new staff



NOT DO

- ✗ DO NOT send refund checks during open academic year
- ✗ DO NOT forget to reconcile timely
- ✗ DO NOT pay all students at FT at the beginning of the term

Making education beyond high school financially accessible to all Californians.



Questions?

Making education beyond high school financially accessible to all Californians.

California Student Aid Commission

**Projects and
Resources**





Grant Delivery Modernization Project

Making education beyond high school financially accessible to all Californians.



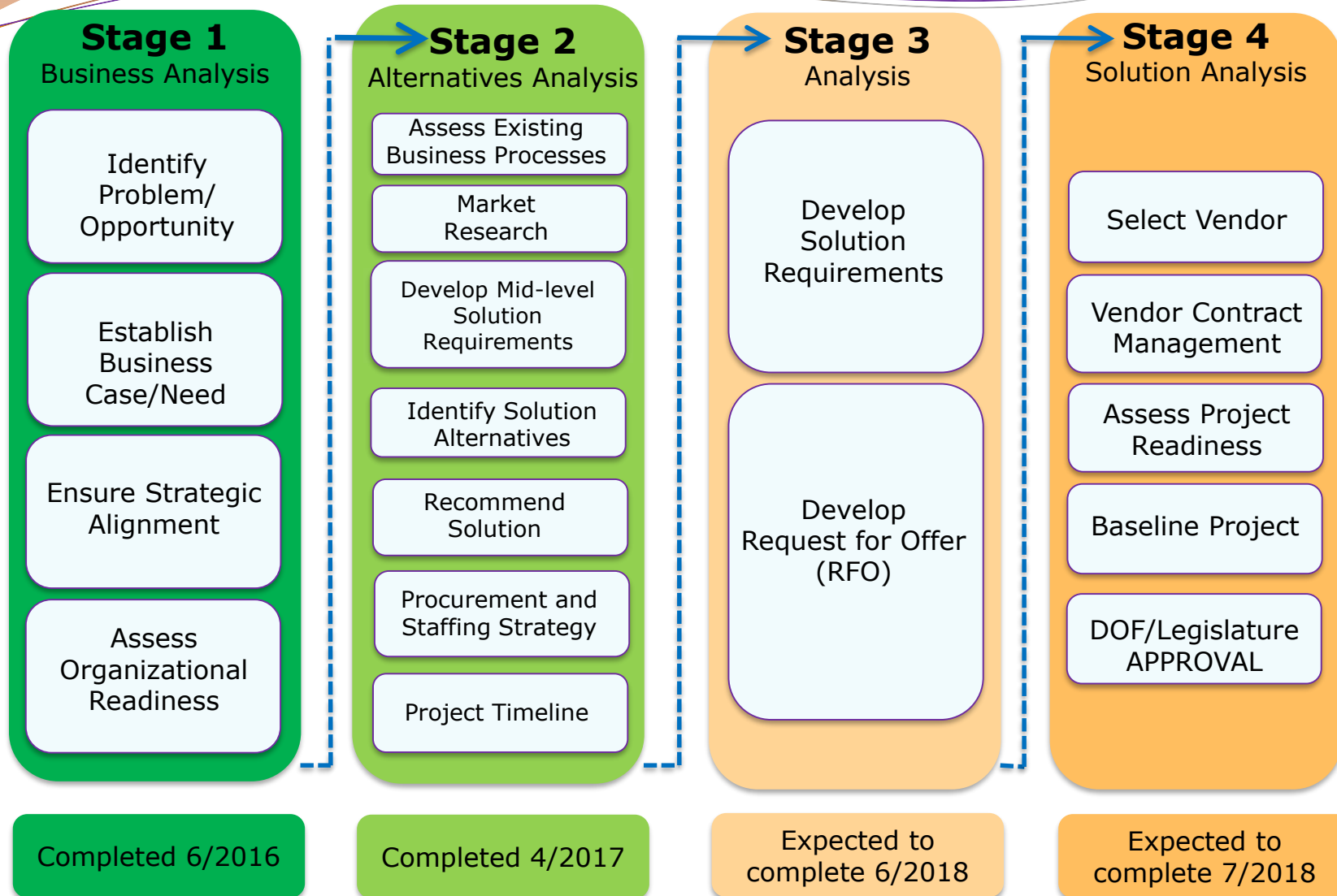
5 Things You Should Know

1. Department of Technology developed a Project Approval Lifecycle (PAL) for all Statewide Project Assessments
2. GDSTM Must Meet the Stage/Gate Model Requirements (which is part of PAL) in order to approve a contract to start the new GDSTM Solution.



5 Things You Should Know

3. GDSM will make WebGrants4Students website and CSAC Applications Compatible with multiple internet browsers, apps, and mobile devices.
4. CSAC hopes to integrate all CSAC Programs into one Application Process and System.
5. Project Launch Date is Targeted for Fall of 2020



Department of Technology Oversight and State Entity Collaboration

Making education beyond high school financially accessible to all Californians.

Resources

Making education beyond high school financially accessible to all Californians.

Commission Website

Welcome to our new website! >



[Contact Us](#)

[Language](#) ▾

[Search](#) 🔍

[For Students](#)

[For Schools & Counselors](#)

[Outreach](#)

[Reports & Publications](#)

[News & Events](#)

[About](#)



Get Started Today

[How to Apply](#)

[Student Login](#)

[Cash for College](#)

[Cal Grant FAQ](#)

List-Serv Subscription

[Contact Us](#)

[Language](#) ▾

[Search](#) 🔍

[For Students](#)

[For Schools & Counselors](#)

[Outreach](#)

[Reports & Publications](#)

[News & Events](#)

[About](#)



Get Started Today

↓

Partnerships

[Get Schooled](#)

[Green360](#)

[Mission: Admission](#)

[College Affordability and
Transparency Center](#)

[Bureau for Private Postsecondary
Education](#)

[National Center for Higher](#)

↓

California Campaigns

[Race To Submit Cal Grant
Dashboard](#)

[Register to Vote](#)

[Amber Alert](#)

[Covered California](#)

[Save our Water](#)

[New Rule for School](#)

↓

Commission Resources

[Cal Grant Eligible Schools](#)

[Enrollment, Persistence, and
Graduation Data](#)

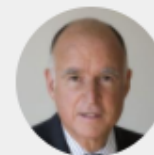
[Job Placement Fact Sheets and
Salary & Wage Information](#)

[Contact Us](#)

[Subscribe to CSAC Important
Updates](#)


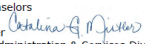


Lupita Cortez Alcalá
Executive Director




Edmund G. Brown Jr.
Office of Governor

List-Serv Notifications

 OPERATIONS MEMO Update from the California Student Aid Commission		STATE OF CALIFORNIA
July 11, 2014	GOM 2014-22	
TO:	Financial Aid Administrators High School Counselors	
FROM:	Catalina G. Mistler  Chief, Program Administration & Services Division	
SUBJECT:	2014-15 Cal Grant Award Amounts and Dream Act Renewals Eligible to File a FAFSA	
<p>This Operations Memo from the California Student Aid Commission (Commission) provides an update on the award amount changes as prescribed in the 2014-15 Budget Act and provides guidance regarding the 2014-15 renewal of Cal Grant Dreamers eligible to complete a Free Application for Federal Student Aid (FAFSA).</p>		
2014-15 Cal Grant Award Amounts		

Operations Memos

Special Alerts

 SPECIAL ALERT Update from the California Student Aid Commission		STATE OF CALIFORNIA
June 30, 2014	GSA 2014-19	
TO:	Financial Aid Administrators	
FROM:	Catalina G. Mistler  Chief, Program Administration & Services Division	
SUBJECT:	Annual Renewal of WebGrants Access Forms	
<p>This Special Alert from the California Student Aid Commission (Commission) reminds institutions of the annual requirement to submit:</p> <ul style="list-style-type: none">• WebGrants Information Security and Confidentiality Agreement (Confidentiality Agreement) and• WebGrants System Administrator's Access Request Form (Access Request Form) to continue access to WebGrants.		
The deadline to submit WebGrants access forms is July 31, 2014.		

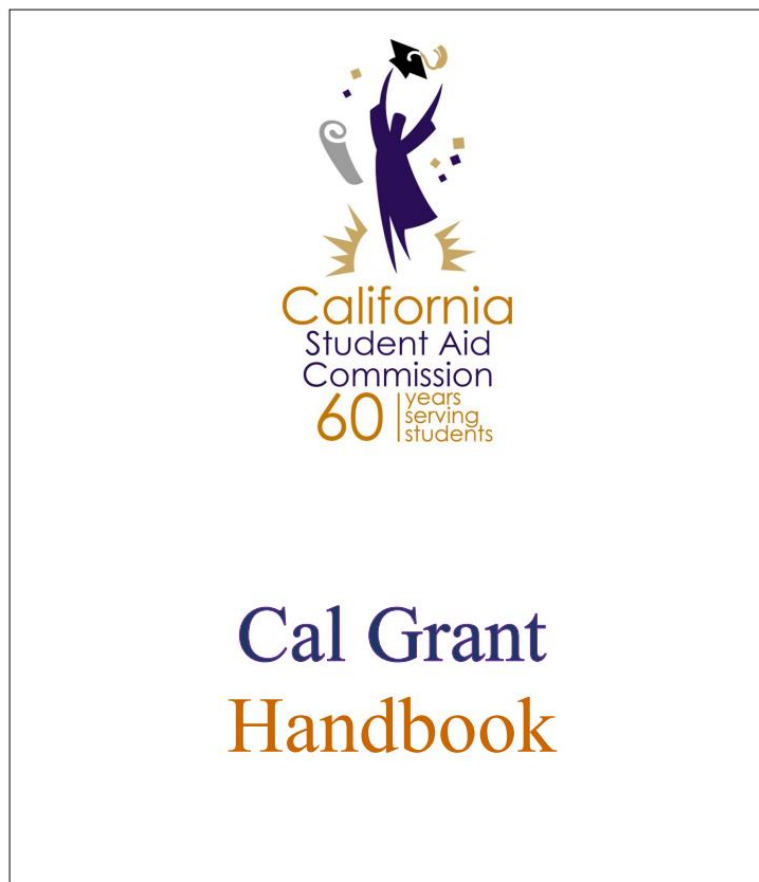


Register at www.csac.ca.gov

Making education beyond high school financially accessible to all Californians.

Cal Grant Handbook

http://www.csac.ca.gov/CGM/calgrant_handbook.pdf



Making education beyond high school financially accessible to all Californians.



Helpful Training and Webinars

- General Cal Grant Information
- Payments and Reconciliation
- New Cal Grant Award Process
- Navigating WebGrants
- California Dream Act



Available @ <https://www.csac.ca.gov/trainings-0>

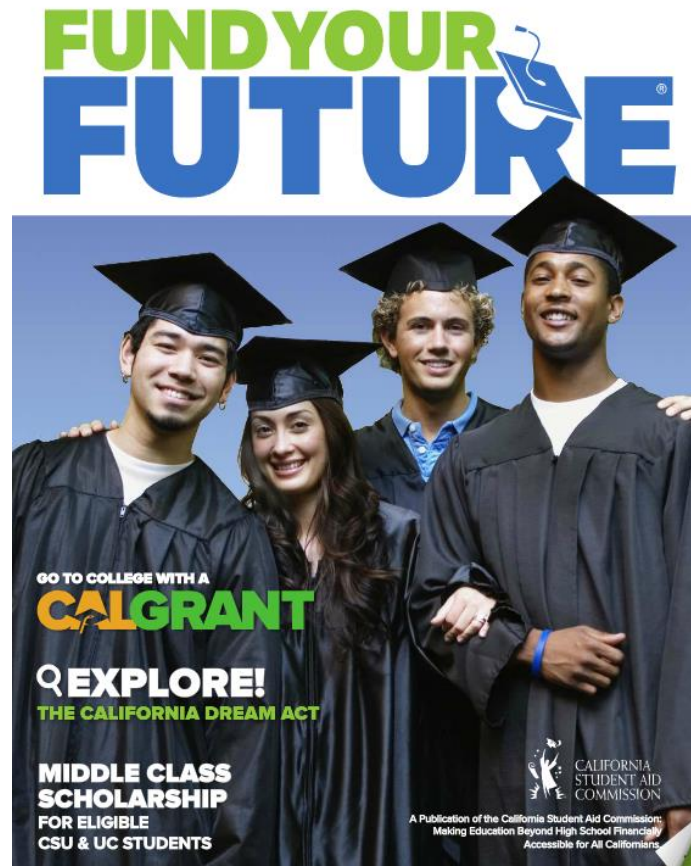
Making education beyond high school financially accessible to all Californians.



Commission Communications

- Fund Your Future Magazine

<http://www.fundyourfuture.org>





Social Media



Like us on Facebook at:
[Facebook.com/CSAC.StudentAidCommission](https://www.facebook.com/CSAC.StudentAidCommission)



Follow us on Twitter:
[@castudentaid](https://twitter.com/castudentaid) [#CalGrants](https://twitter.com/CalGrants)



Follow us on Instagram:
[castudentaid](https://www.instagram.com/castudentaid)



Institutional Support

Phone: 1 (888) 294-0153

Fax: 1 (916) 464-6499

SchoolSupport@csac.ca.gov

www.csac.ca.gov

Making education beyond high school financially accessible to all Californians.